



## User Manual



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## 1. Introduction

### 1.1 Document Purpose

The purpose of this User Guide is to explain how to install and use the Rebate Ninja application. The document contains a table of contents, detailed information, images and a frequently asked questions section for better understanding.

### 1.2 Application Overview

Rebate Ninja is for the manufacturers to streamline the rebate management process.

Refunding a portion of the purchase price is known as a rebate. The purchase of a certain amount or value of items within a certain time frame is often the basis for rebates. Rebates, in contrast to discounts, are issued following the full invoicing of the purchase price.

It includes the rebate program, rebate program members, and all the calculations and approvals related to the rebate program.

The main benefit of this app is to eliminate the manual calculation, review, and approval processes. This will help manufacturers improve their relationships with their customers.

## 2. Administration

This section will help you set up your organization to start using the Rebate Ninja app application on the web and in Salesforce1. To set up your Rebate Ninja application, you need to do steps 2.1 to 2.7.

### 2.1 Install Rebate Ninja application

To install the Rebate Ninja application:

1. Go to AppExchange <http://www.salesforce.com/appexchange>
2. Search for Rebate Ninja



3. Click the button.
4. Click the option Log in to the AppExchange.

5. You can then select to install Rebate Ninja in either Production (includes active, trail or developer orgs) or Sandbox.



6. Select check box to agree the terms and conditions.

7. Click the **Confirm and Install!** button.

8. Enter your organization credentials.

9. Select installation details (either for Admin Only, All Users, or Specific Profiles)

10. Then click Install.

If the installation is successfully completed, you will see the confirmation message.

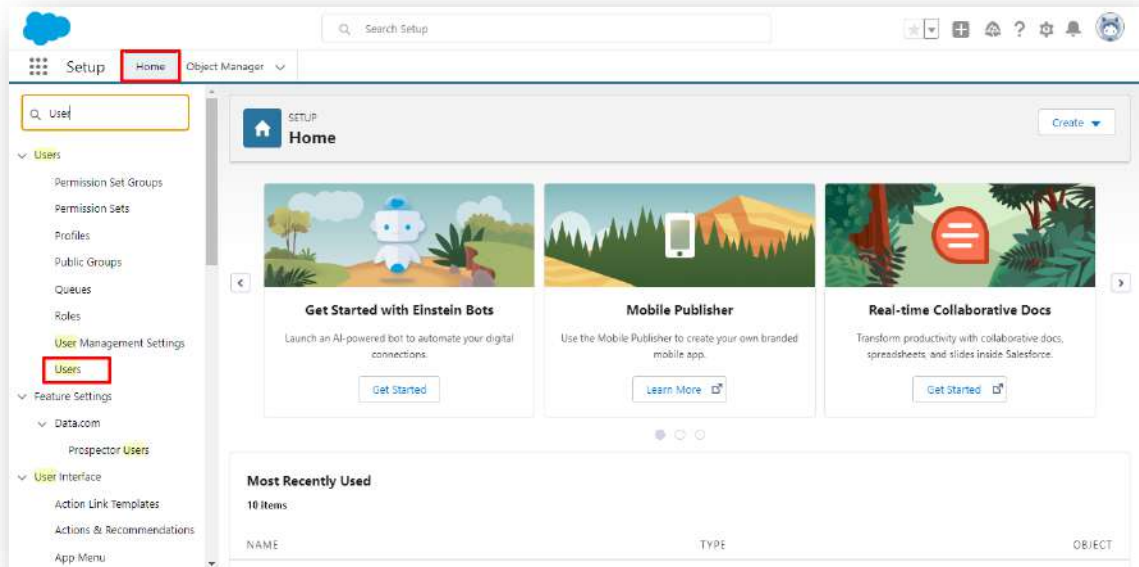
### 3. Prerequisites

Before using the application, there are some pre-requisites to be followed, there is a need for a user-account. There are two types of main users as below:

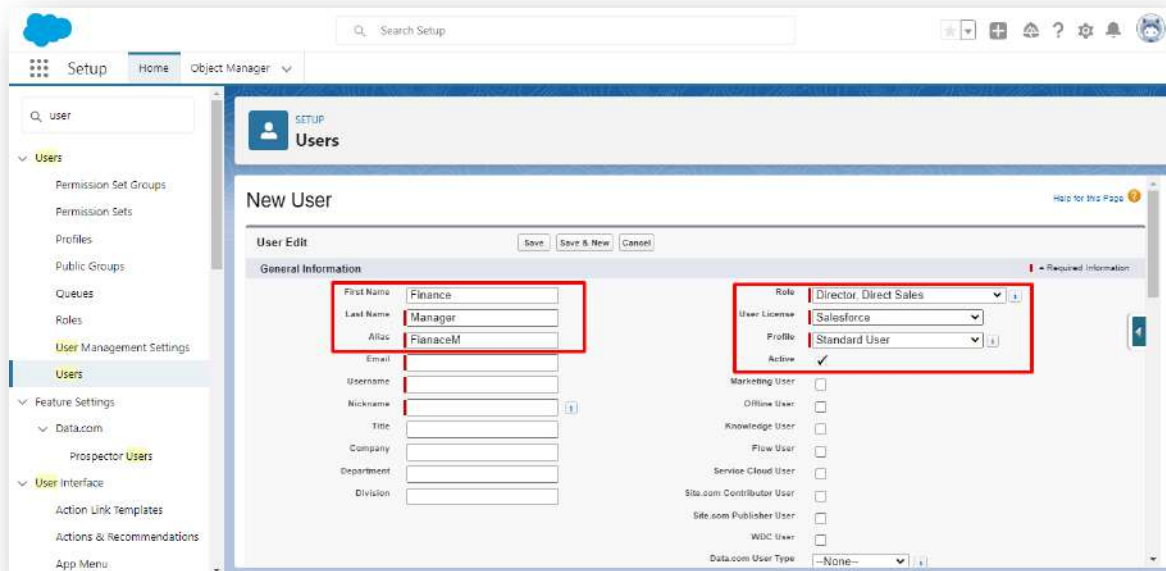
- Admin User (Manager)
- Standard User (Finance Manager)

### 3.1. Create a User

Administrator user can create new user. In the quick find box under setup, enter "users."

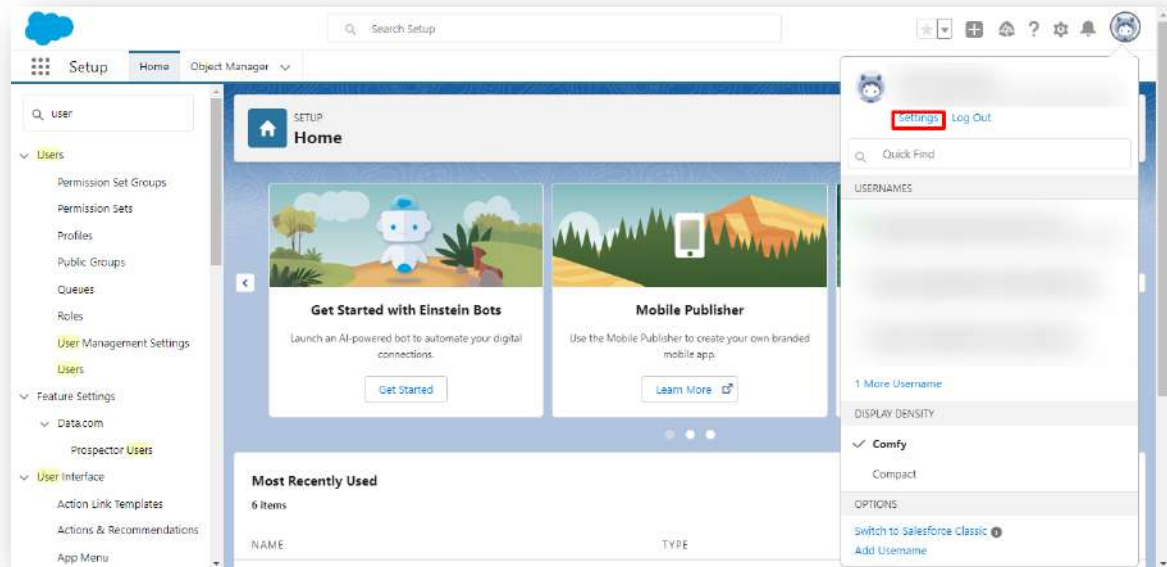


To create a new user account, click the "new user" button and fill out the form with user license, profile, roles, time zone and other details and save the user information.

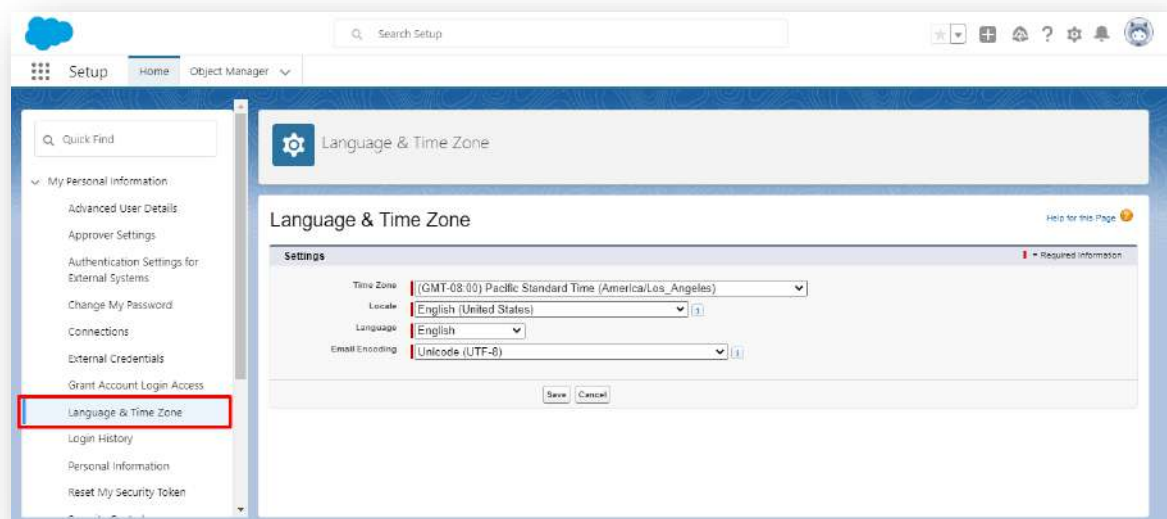


## 3.2. Set Time Zone of the Org

### 3.2.1 Click on profile and select setting



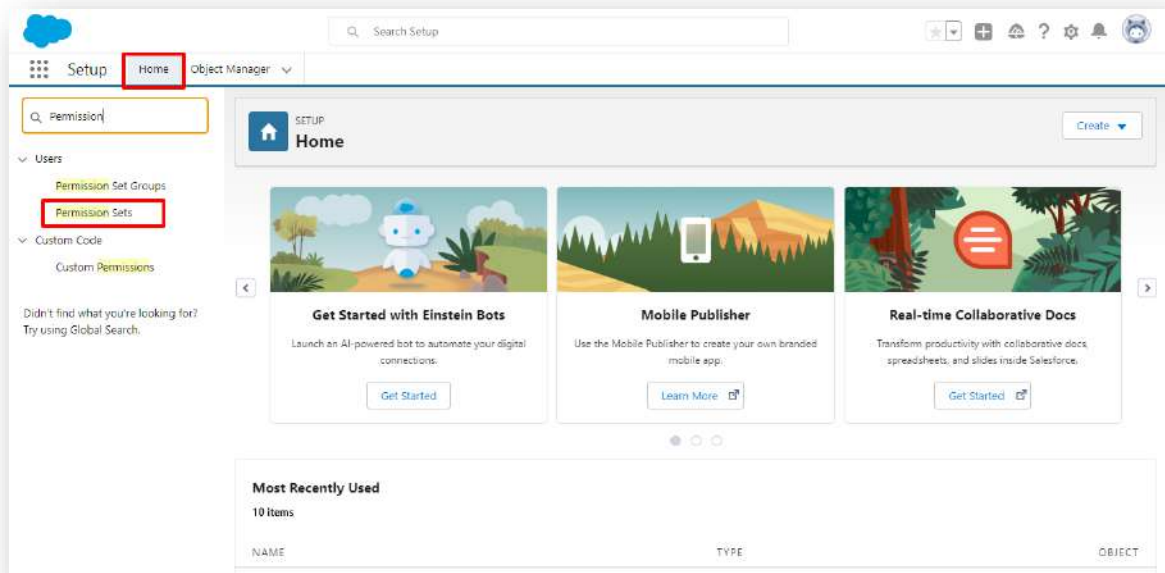
### 3.2.2 Set Language & Time Zone for your current Org



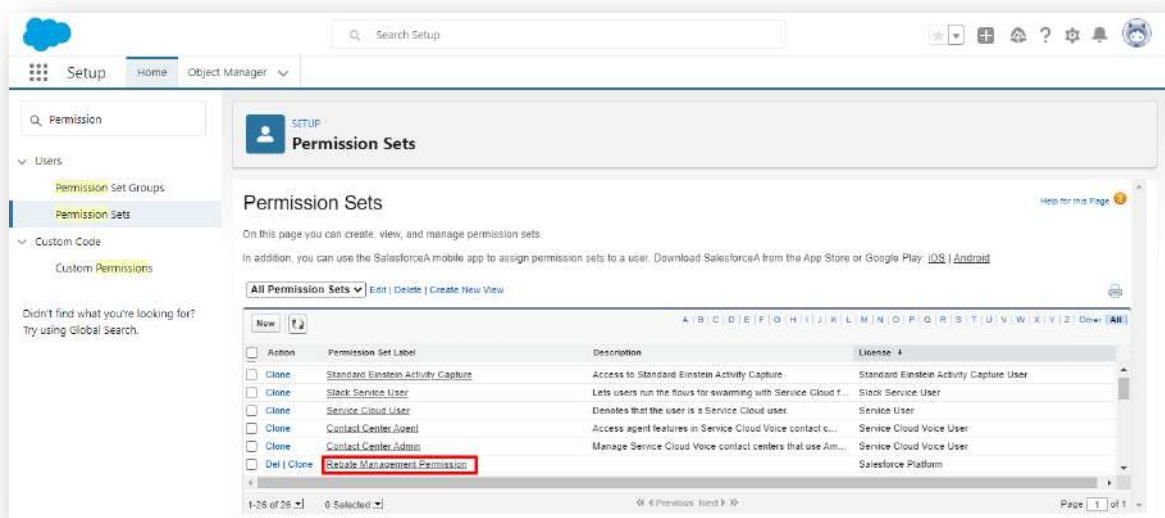
### 3.2.3 Click on the save button.

### 3.3. Assign permission set to the user

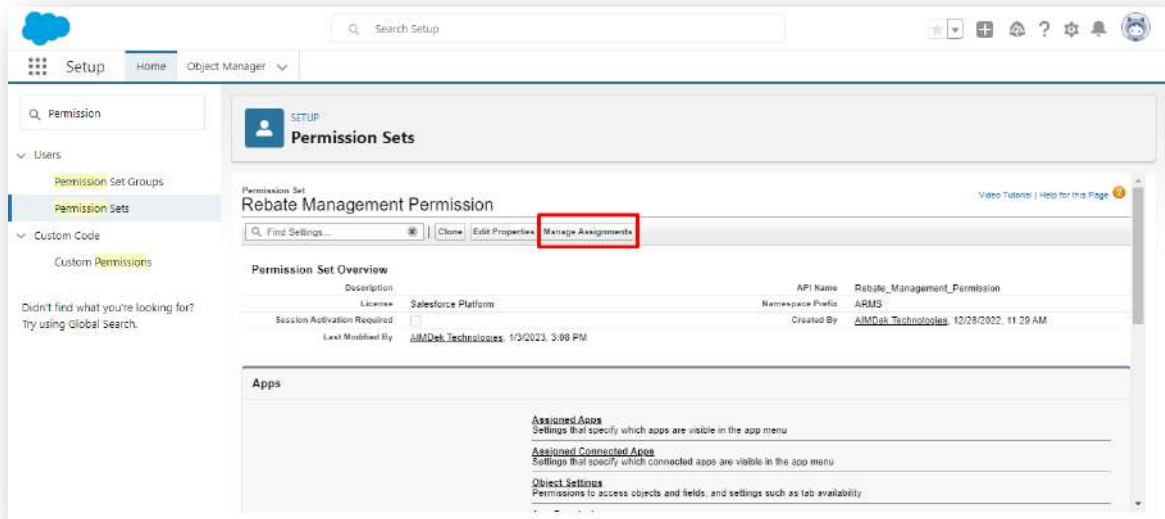
#### 3.3.1 Search 'permission set' in quick find in setup



#### 3.3.2 Select Rebate\_Management\_Permission

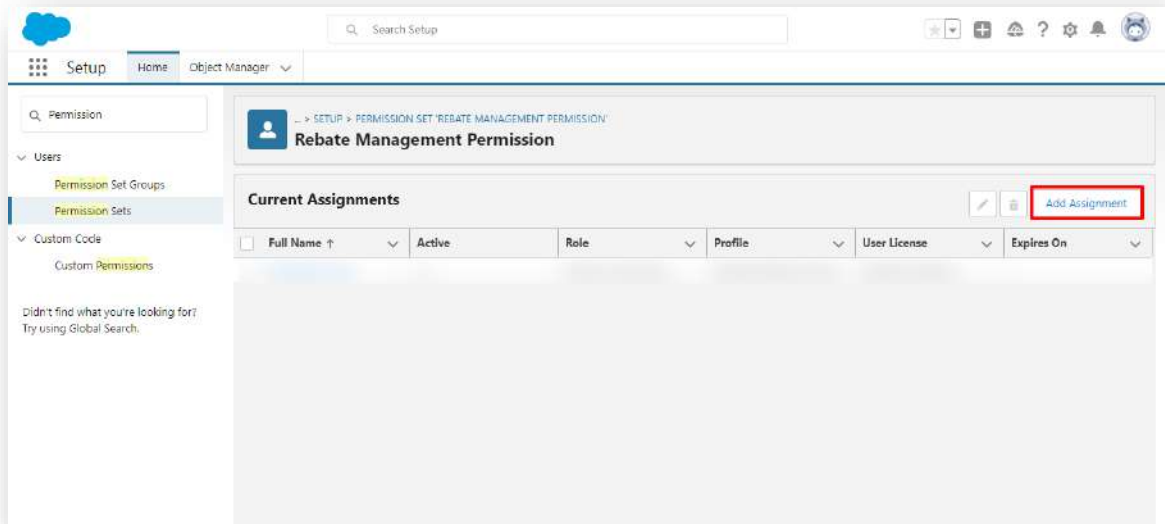


### 3.3.3 Select Manage Assignment



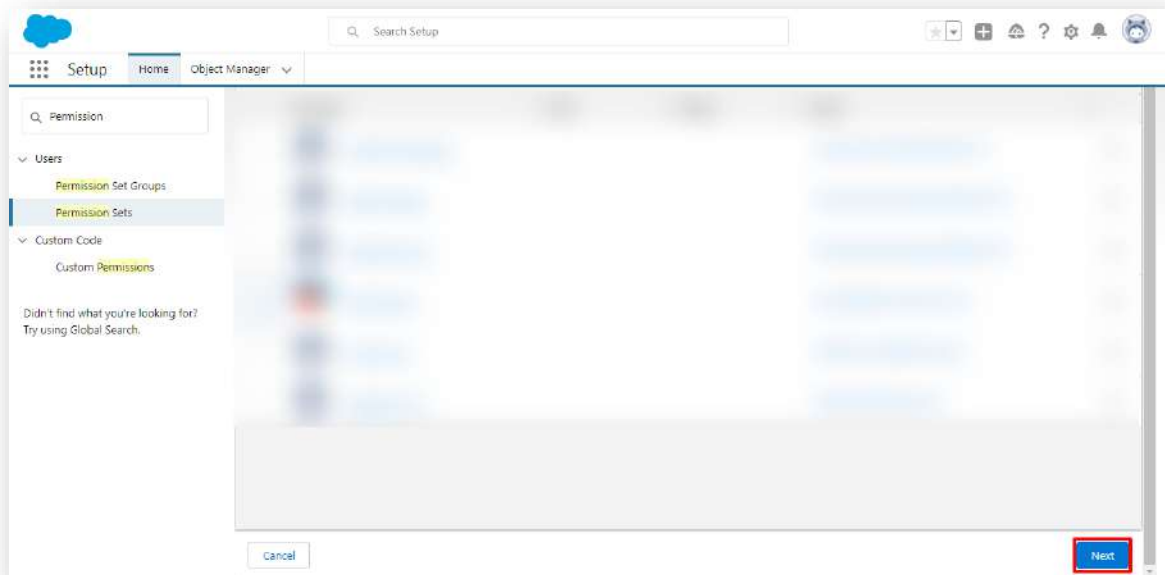
The screenshot shows the Salesforce Setup interface. In the left sidebar, the 'Permission Sets' link is selected. The main content area displays the 'Rebate Management Permission' page. At the top of this page, there are buttons for 'Find Settings...', 'Clone', 'Edit Properties', and 'Manage Assignments'. The 'Manage Assignments' button is highlighted with a red rectangular box. Below this, the 'Permission Set Overview' section shows details like 'Description: Salesforce Platform', 'API Name: Rebate\_Management\_Permission', and 'Created By: AIMDek Technologies'. The 'Apps' section below contains links for 'Assigned Apps', 'Assigned Connected Apps', and 'Object Settings'.

### 3.3.4 Select Add Assignment



The screenshot shows the Salesforce Setup interface, specifically the 'Current Assignments' section of the 'Rebate Management Permission' page. The breadcrumb trail at the top indicates the path: 'Setup > Permission Set: Rebate Management Permission'. Below the breadcrumb, the 'Current Assignments' section has a table with columns: 'Full Name', 'Active', 'Role', 'Profile', 'User License', and 'Expires On'. In the top right corner of this section, there is a button labeled 'Add Assignment', which is highlighted with a red rectangular box.

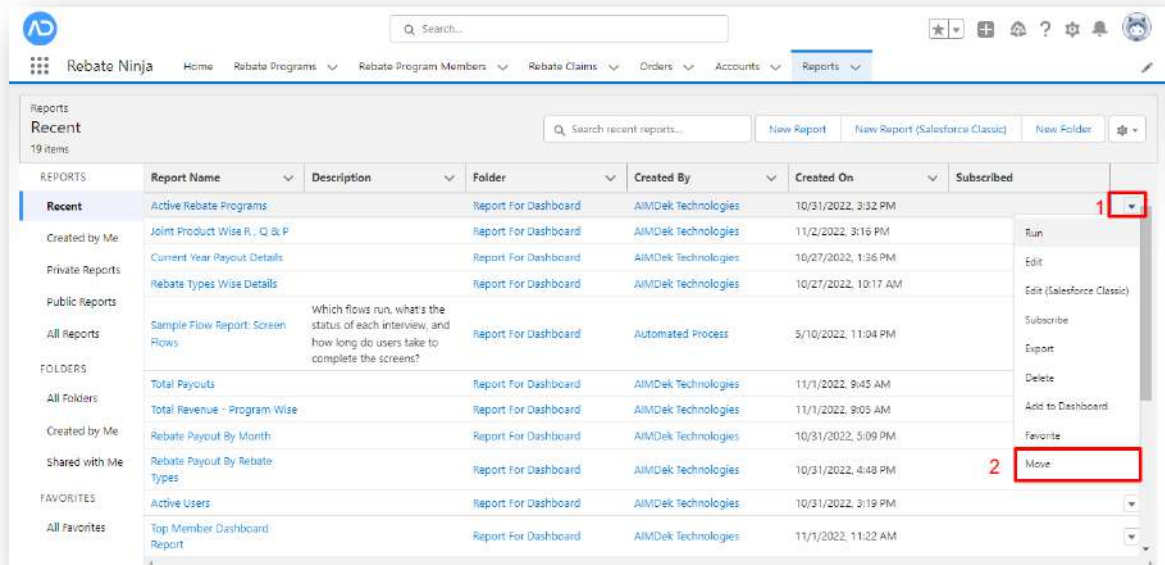
3.3.5 Select the standard user you want to Assign and save.



### 3.4. Move Reports to the Public Folder

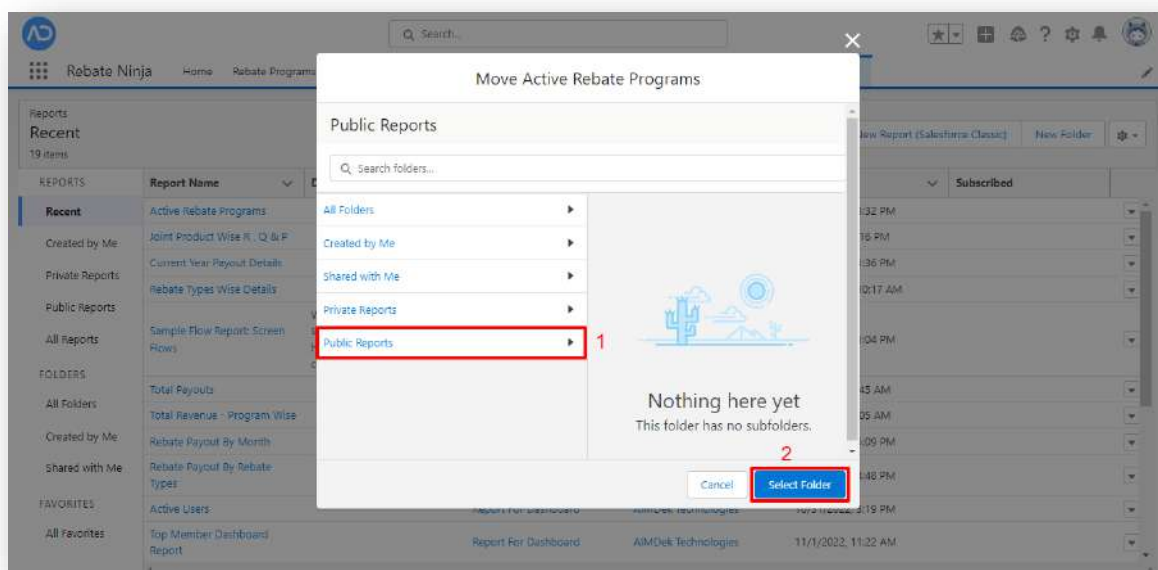
3.4.1. For the Reports section, there is only an “Administrator” who has the right to give permissions to a standard user. By default, only Admin users have the right to view the reports.

Admin User must put reports into the “Public” folder to give rights to the standard user.  
Admin users must follow the steps below:



3.4.2. Go to the Reports from Nav bar, there is an option for each report to move it to the “Public” folder.

Click on “Move”, select “Public Reports” and click on “Select Folder” button as shown below

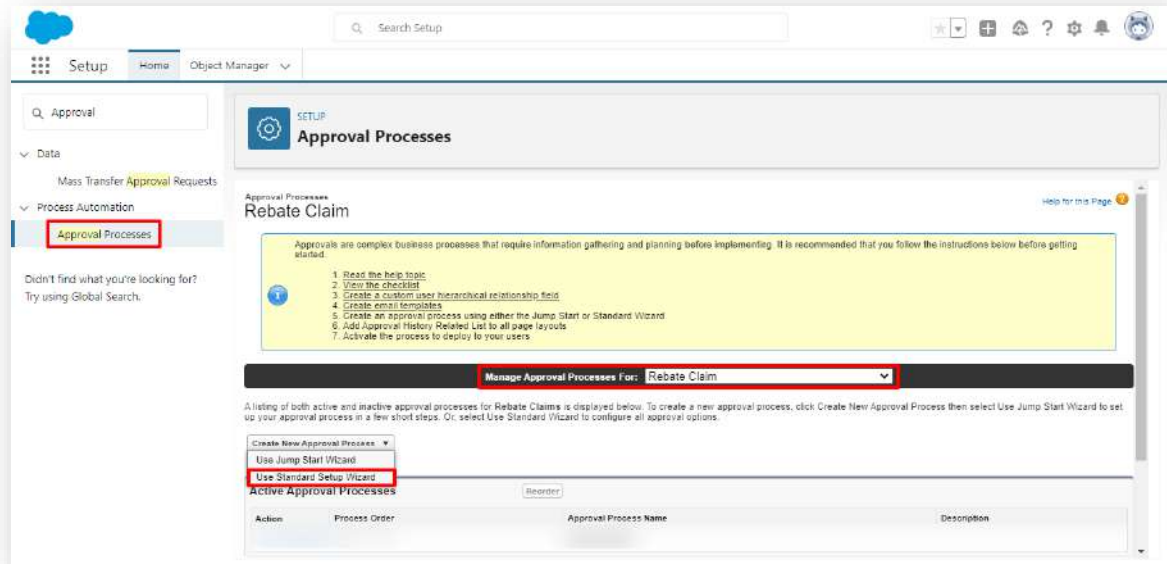


### 3.5. Create the Approval Process

Users must follow the steps below for the approval process:

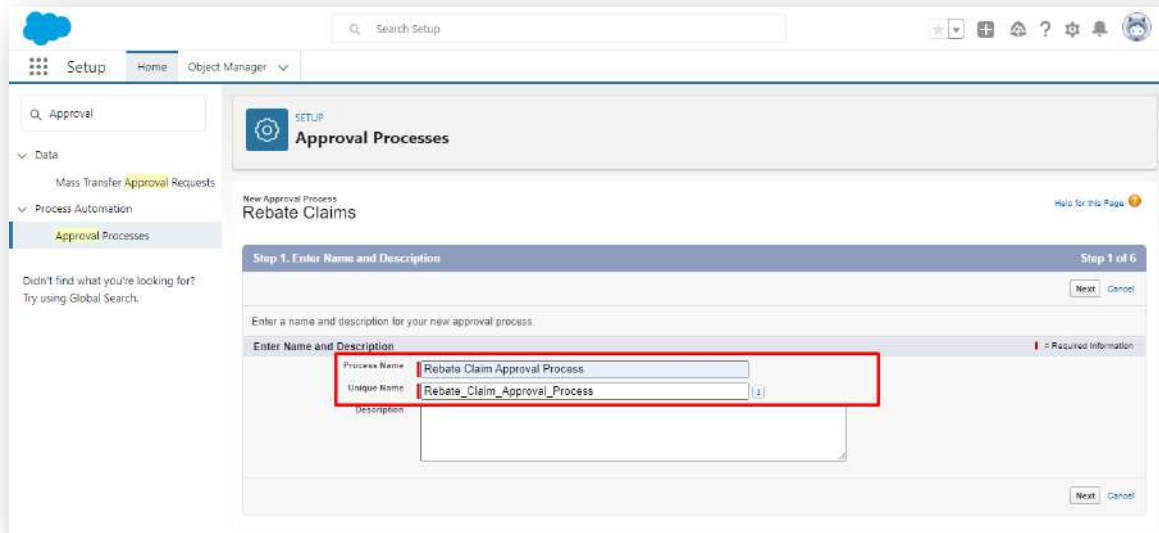
3.5.1 - Go to Setup -> Select Approval Processes -> Click on Manage Approval Processes for Rebate Claim (Custom Object)

- Select "Create New Approval Process" button -> Use Standard Setup Wizard



3.5.2 Enter the Process name as it is show in Image

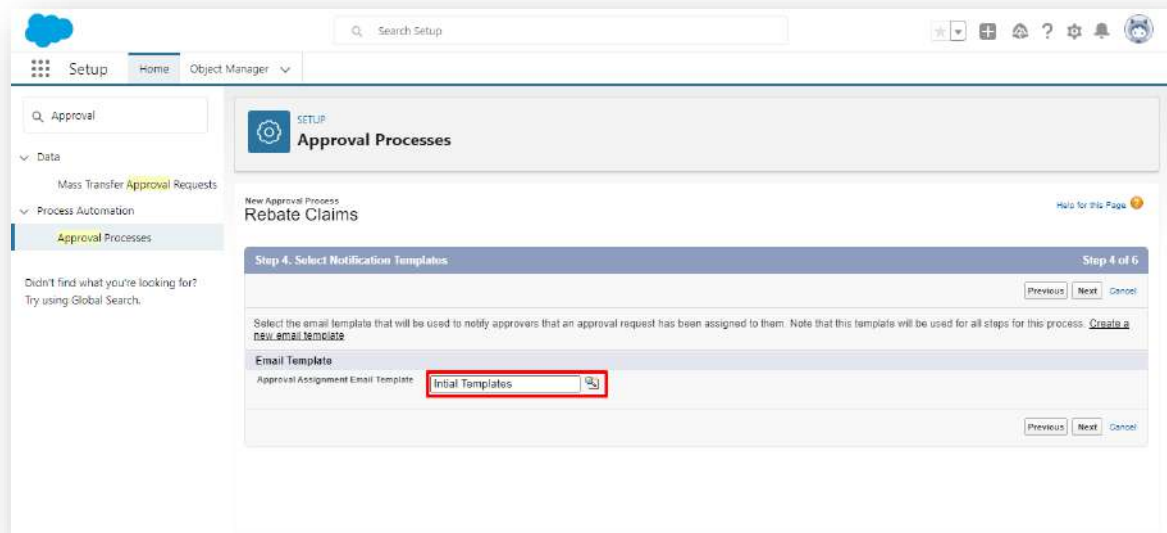
“Rebate Claim Approval Process” and the description and press the “Next” button.



The screenshot shows the 'Approval Processes' setup screen. The left sidebar has a search bar with 'Approval' and a list of categories: Data, Process Automation, and Approval Processes. The main area is titled 'New Approval Process' and 'Rebate Claims'. It is 'Step 1 of 6: Enter Name and Description'. The form has three fields: 'Process Name' with the value 'Rebate Claim Approval Process', 'Unique Name' with the value 'Rebate\_Claim\_Approval\_Process', and an empty 'Description' field. A red box highlights the 'Process Name' and 'Unique Name' fields. 'Next' and 'Cancel' buttons are at the bottom right.

3.5.3 Set Specify Criteria as Null and Press “Next”.

3.5.4 - Select Template - Classic -> Rebate Management Template -> Initial Templates



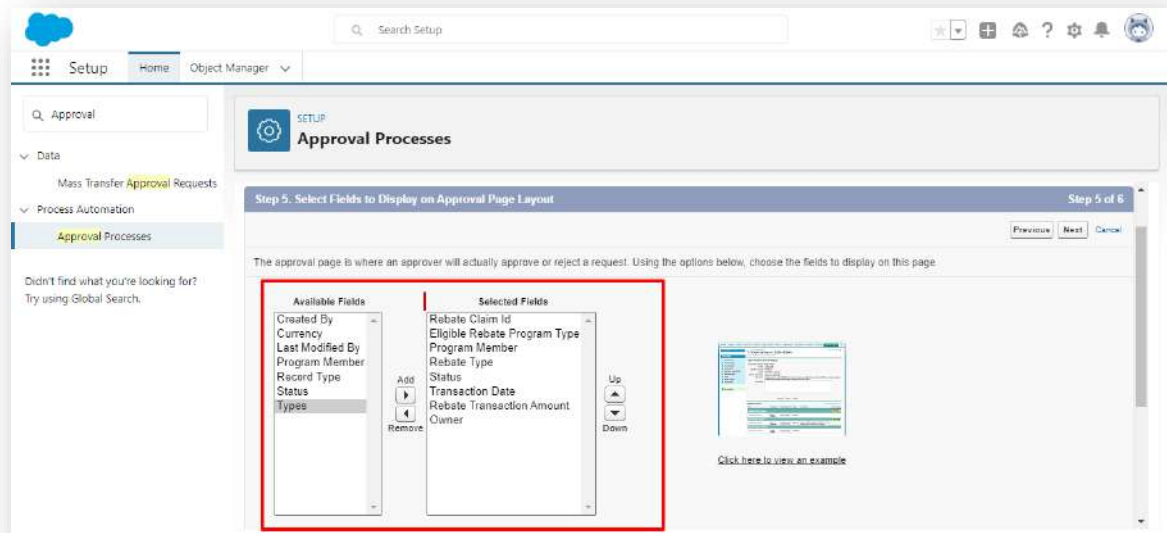
The screenshot shows the 'Approval Processes' setup screen at 'Step 4 of 6: Select Notification Templates'. The main area is titled 'New Approval Process' and 'Rebate Claims'. The form has a section 'Email Template' with a dropdown menu showing 'Initial Templates'. A red box highlights the dropdown menu. 'Previous', 'Next', and 'Cancel' buttons are at the bottom right.

Press “Next” button.

### 3.5.5 - Select Field To display when user Approved or Reject Claim

\* Select Fields and Add

1. Eligibility Rebate Program Type
2. Program Member
3. Rebate Type
4. Rebate Transaction Amount
5. Status (First Status)
6. Transaction Date



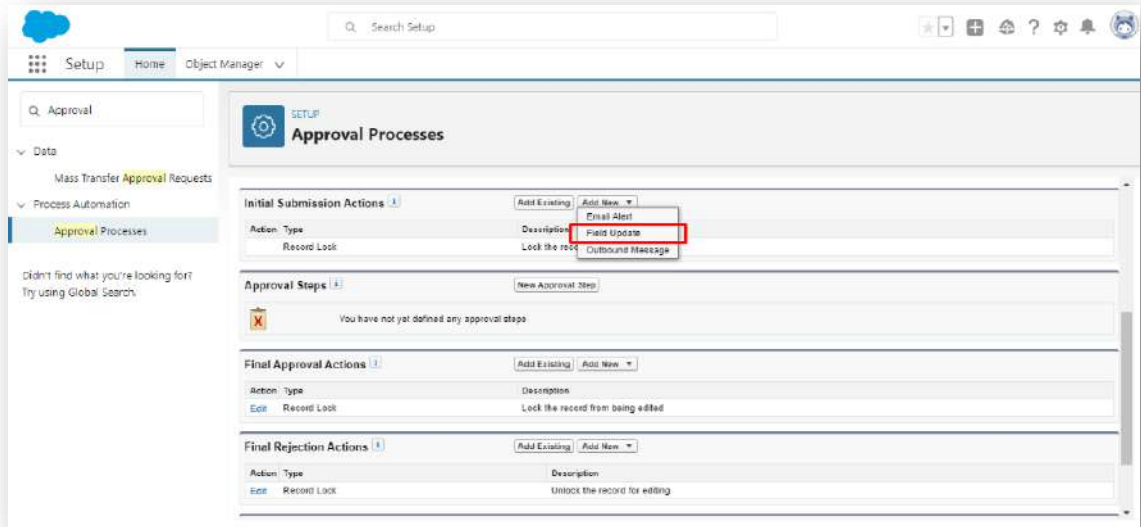
Press “Next”.

-Select “I will do this later. Take me to the approval detail page to review what I've just created.” and Press “Go” button.

### 3.5.6 - Add User for Initial Submitters

- I. Select Owner in Search and Add Rebate Claim Owner and Press “Next”.

### 3.5.7 - Initial Submission Actions \* Click on Add New button-> Select Field Update option

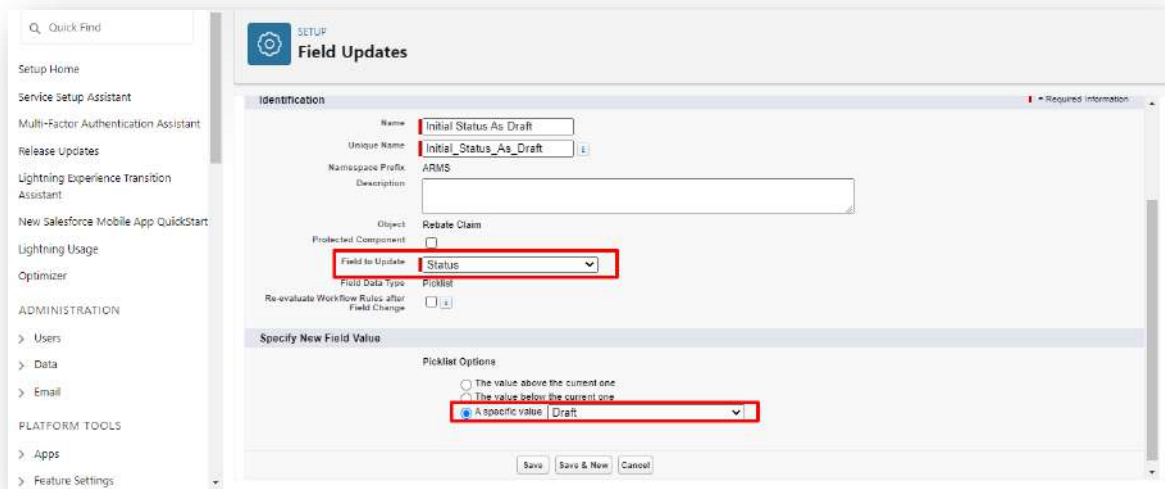


The screenshot shows the 'Approval Processes' setup page. Under 'Initial Submission Actions', there is a table with the following content:

| Action Type | Description     |
|-------------|-----------------|
| Record Lock | Lock the record |

A red box highlights the 'Add New' button, which has a dropdown menu showing 'Field Update' as the selected option.

- Name -> Initial Changing Status to Draft
- Field to Update -> Status
- Specify New Field Value -> Draft



The screenshot shows the 'Field Updates' setup page. The 'Identification' section contains the following fields:

- Name: Initial Status As Draft
- Unique Name: Initial\_Status\_As\_Draft
- Namespace Prefix: ARMS
- Description: (empty)

The 'Field to Update' dropdown menu is highlighted with a red box, showing 'Status' as the selected option.

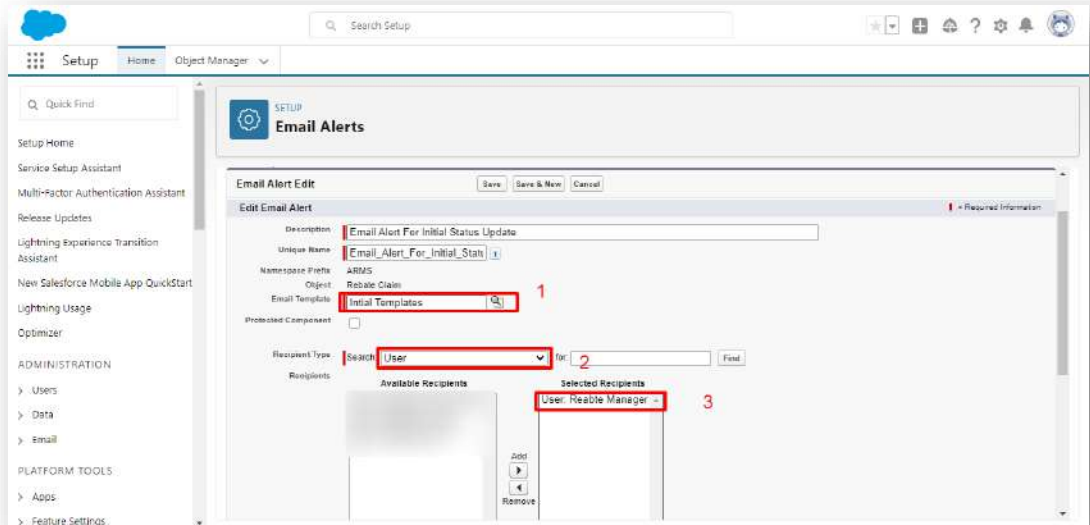
The 'Specify New Field Value' section is highlighted with a red box, showing the following options:

- ☐ The value above the current one
- ☐ The value below the current one
- ☒ A specific value: Draft

Press “Save” button.

- Add New -> Email Alert
- Enter Description, Unique Name, select Email Template

- Search -> User, add Manager to select Recipients

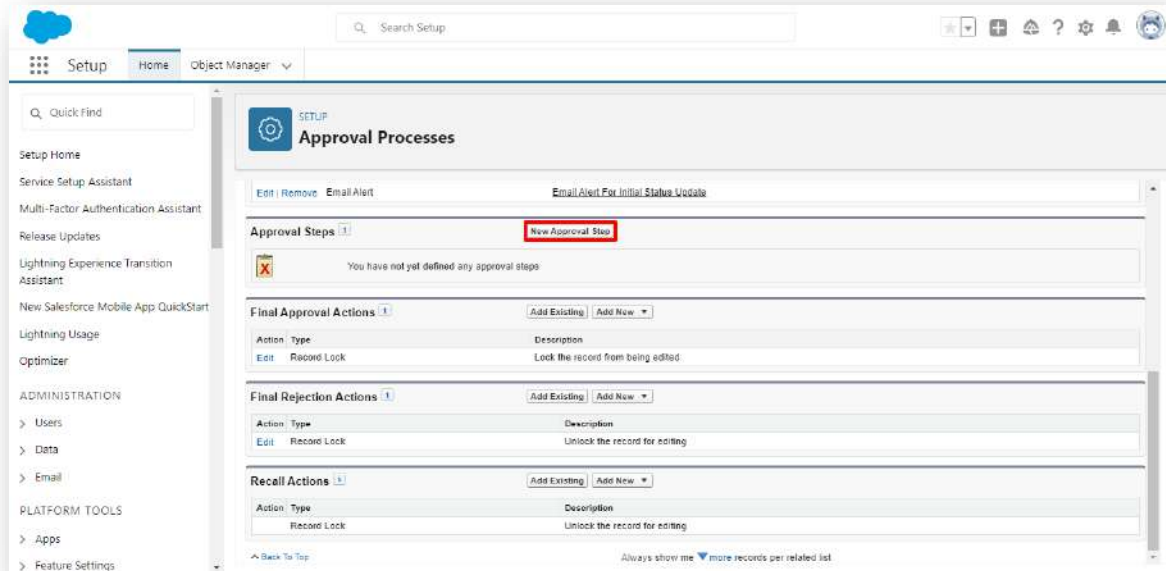


The screenshot shows the 'Email Alerts' setup page. The 'Email Alert Edit' form is displayed with the following fields:

- Description: Email Alert For Initial Status Update
- Unique Name: Email\_Alert\_For\_Initial\_Stat
- Namespace Prefix: ARMS
- Object: Rebate Claim
- Email Template: Initial Templates
- Protected Component: ☐

The 'Recipients' section is highlighted with a red box. It shows a search for 'User' and a list of available recipients. The 'Selected Recipients' list includes 'User: Meable Manager'.

3.5.8 - Next step is “Approval Steps”. Click on “New Approval Step” button.



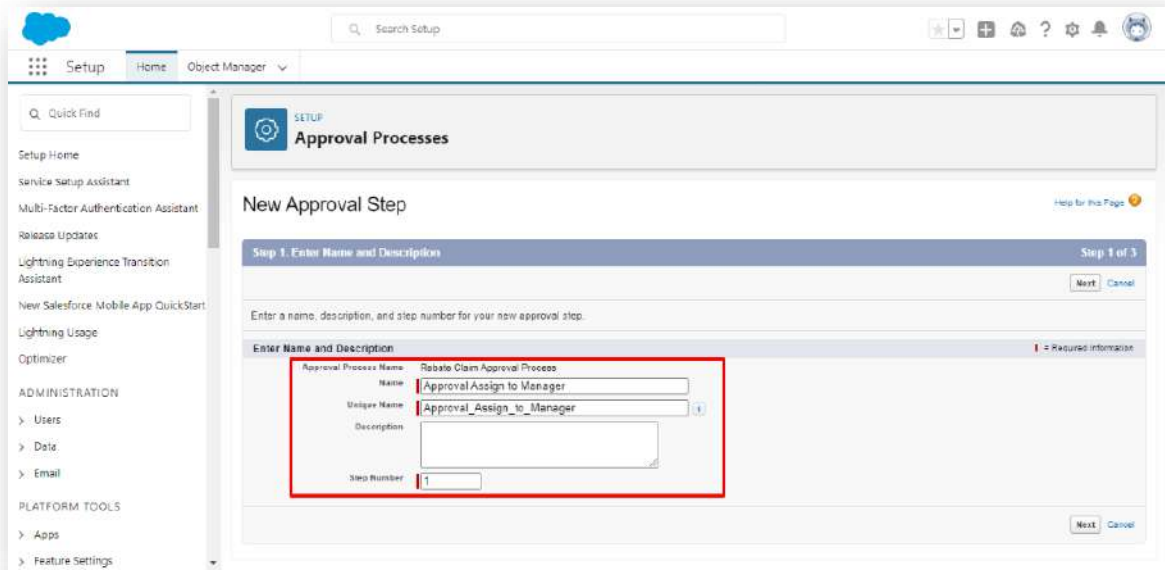
The screenshot shows the 'Approval Processes' setup page. The 'Approval Steps' section is highlighted with a red box, showing a 'New Approval Step' button. Below this, there are sections for 'Final Approval Actions', 'Final Rejection Actions', and 'Recall Actions', each with a table of actions and their descriptions.

| Action | Type        | Description                       |
|--------|-------------|-----------------------------------|
| Edit   | Record Lock | Lock the record from being edited |

| Action | Type        | Description                   |
|--------|-------------|-------------------------------|
| Edit   | Record Lock | Unlock the record for editing |

| Action | Type        | Description                   |
|--------|-------------|-------------------------------|
|        | Record Lock | Unlock the record for editing |

- Enter “Name” and “Description” and Press Next button.



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Quick Find

Approval Processes

New Approval Step

Step 1: Enter Name and Description

Step 1 of 3

Next

Cancel

Enter a name, description, and step number for your new approval step.

Enter Name and Description

Approval Process Name: Rabato Claim Approval Process

Name: Approval Assign to Manager

Unique Name: Approval\_Assign\_to\_Manager

Description:

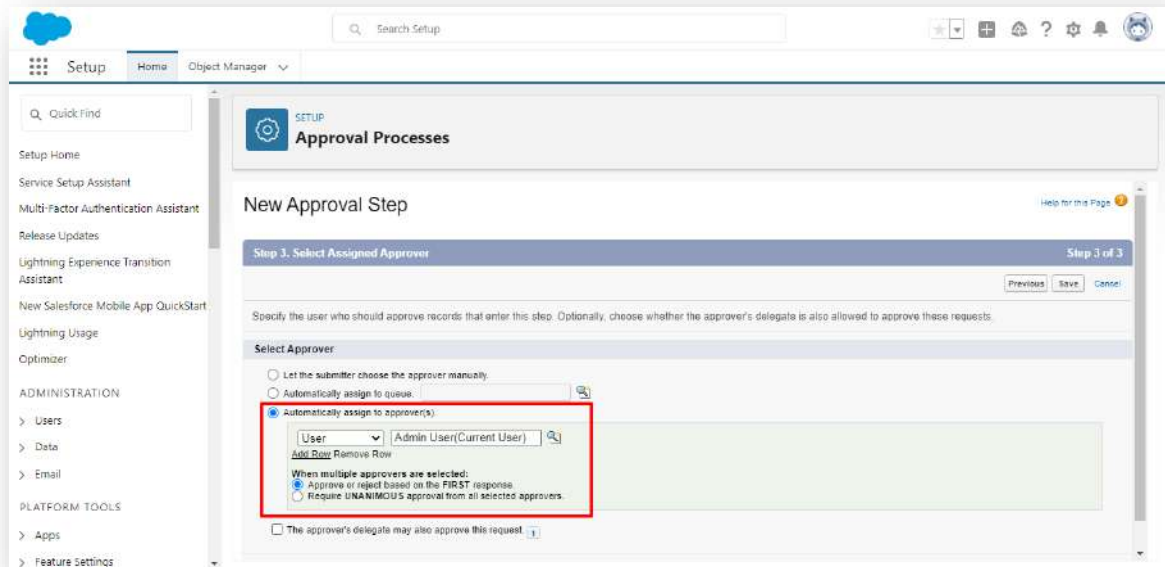
Step Number: 1

Next

Cancel

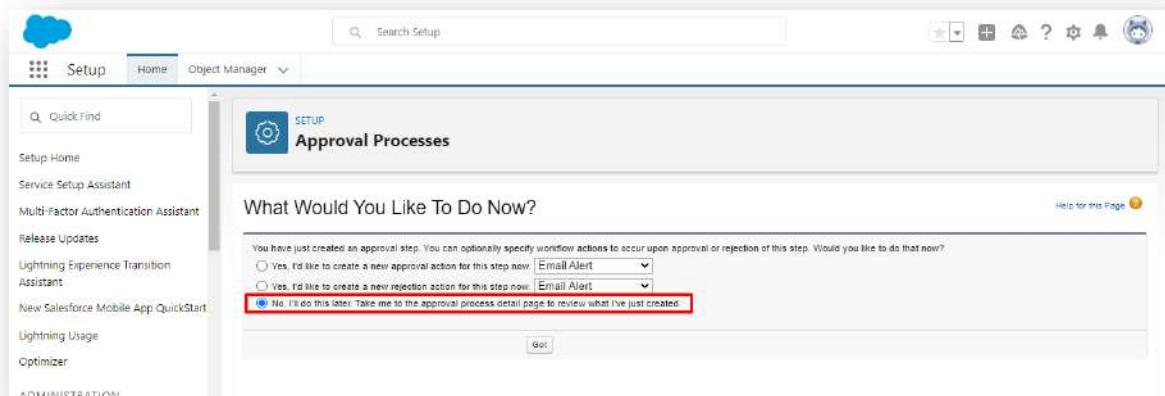
Select Options as mentioned below.

- I. All records should enter this step.
- II. Automatically assign to approver(s).
- III. User and add Admin (Current User or Manager)



The screenshot shows the 'New Approval Step' configuration page in Salesforce Setup. The left sidebar contains navigation links like 'Setup Home', 'Service Setup Assistant', and 'ADMINISTRATION'. The main content area is titled 'Approval Processes' and 'New Approval Step'. It shows 'Step 3. Select Assigned Approver' with instructions to specify the user who should approve records. Under 'Select Approver', three radio buttons are present: 'Let the submitter choose the approver manually', 'Automatically assign to queue', and 'Automatically assign to approver(s)'. The third option is selected and highlighted with a red box. Below it, a table shows 'User' as 'Admin User(Current User)' with 'Add Row' and 'Remove Row' links. Further down, under 'When multiple approvers are selected', the 'Approve or reject based on the FIRST response' option is selected and highlighted with a red box. A 'Previous' button is visible at the top right of the step area.

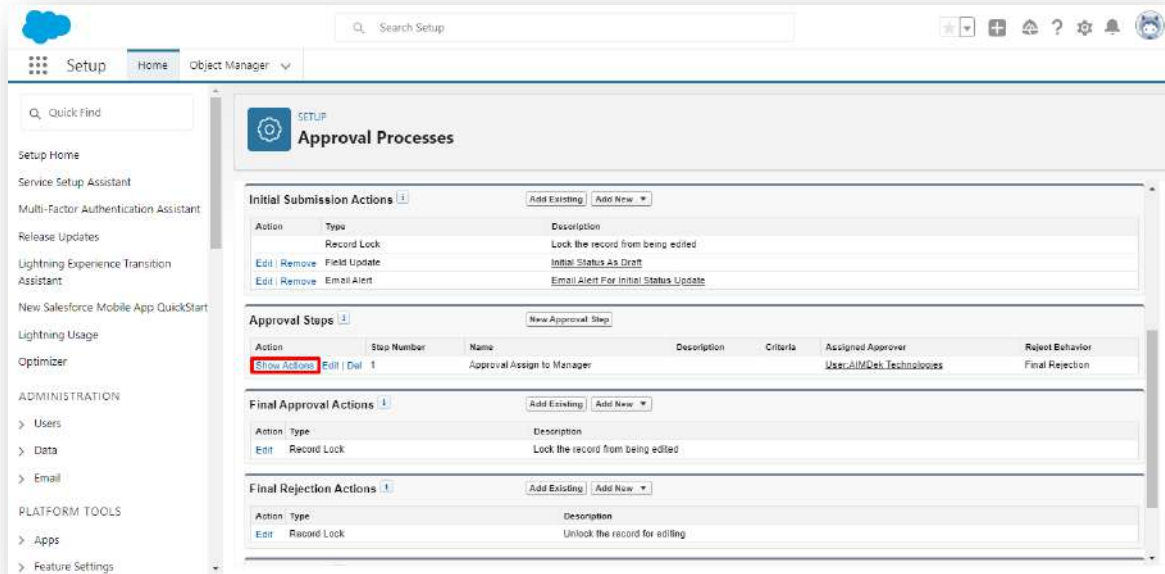
Press “Next” button and system will show the below option and select highlighted option.



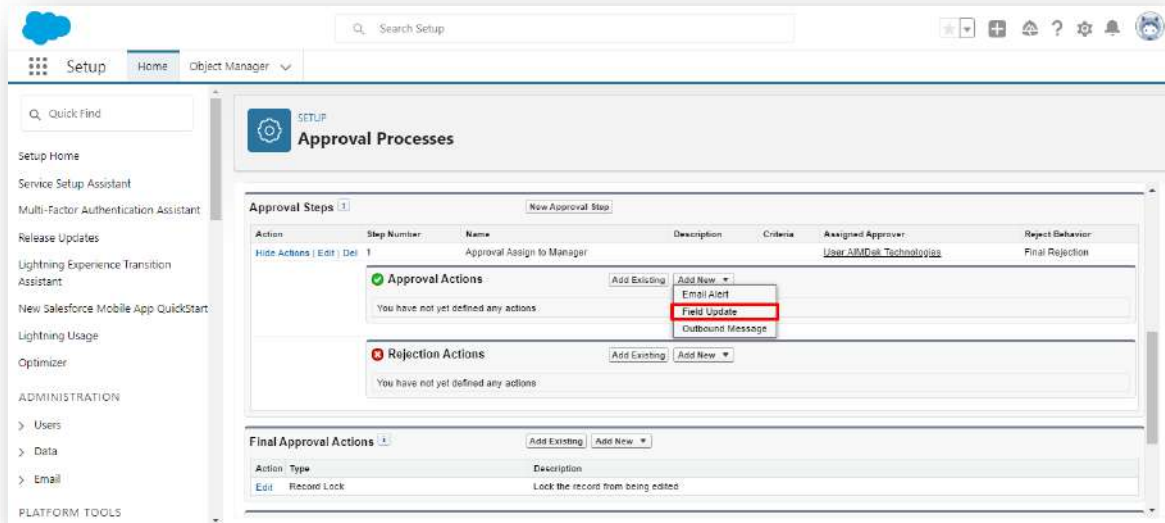
The screenshot shows the 'What Would You Like To Do Now?' page in Salesforce Setup. The left sidebar is the same as the previous screenshot. The main content area is titled 'Approval Processes' and 'What Would You Like To Do Now?'. It contains instructions about specifying workflow actions. Three radio buttons are present: 'Yes, I'd like to create a new approval action for this step now', 'Yes, I'd like to create a new rejection action for this step now', and 'No, I'll do this later. Take me to the approval process detail page to review what I've just created'. The third option is selected and highlighted with a red box. A 'Got It' button is at the bottom right.

### 3.5.9 - Update Field Status in First Approval Step

I. From Approval Steps select "Show Action" then Select "Add New" and Select "Field Update"

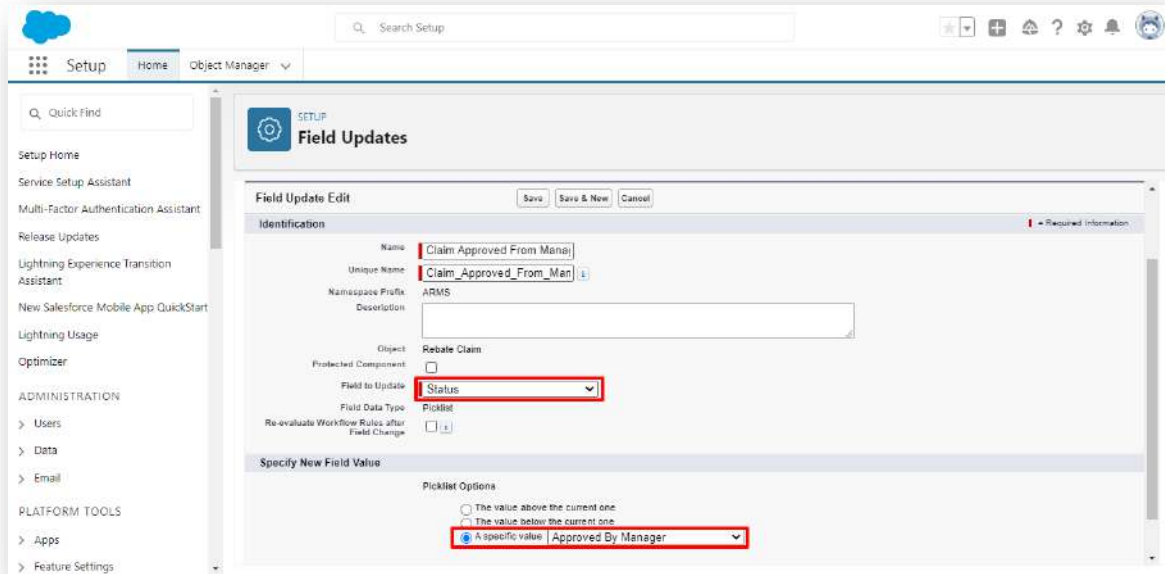


The screenshot shows the Salesforce Setup interface for Approval Processes. The left sidebar contains navigation links like Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, New Salesforce Mobile App QuickStart, Lightning Usage, Optimizer, ADMINISTRATION (Users, Data, Email), PLATFORM TOOLS (Apps, Feature Settings), and a Quick Find search bar. The main content area is titled "Approval Processes" and includes sections for Initial Submission Actions, Approval Steps, Final Approval Actions, and Final Rejection Actions. The "Approval Steps" section shows a table with columns: Action, Step Number, Name, Description, Criteria, Assigned Approver, and Reject Behavior. The first step is "Approval Assign to Manager" with Step Number 1, assigned to "User:AIMDek Technologies". The "Initial Submission Actions" table shows actions like "Record Lock" (Initial Status As Draft), "Field Update" (Email Alert For Initial Status Update), and "Email Alert". The "Final Approval Actions" table shows a "Record Lock" action. The "Final Rejection Actions" table shows a "Record Lock" action.



This screenshot shows the same Salesforce Setup interface, but with the "Approval Steps" section expanded. A dropdown menu is open under the "Add New" button, showing options: "Email Alert", "Field Update" (highlighted with a red box), and "Outbound Message". The "Approval Steps" table shows the "Approval Assign to Manager" step. Below it, the "Approval Actions" section is expanded, showing a message "You have not yet defined any actions." The "Rejection Actions" section is also expanded, showing a message "You have not yet defined any actions." The "Final Approval Actions" section shows a "Record Lock" action.

II. Enter "Name", "Unique Name" and Select "Status" in Field to Update. Select A specific value as "Approved by Manager"



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### Field Updates

Field Update Edit

Save Save & New Cancel

Identification

Name Claim Approved From Manager

Unique Name Claim\_Approved\_From\_Man

Namespace Prefix ARMS

Description

Object

Protected Component

Field to Update Status

Field Data Type

Re-evaluate Workflow Rules after Field Change

Specify New Field Value

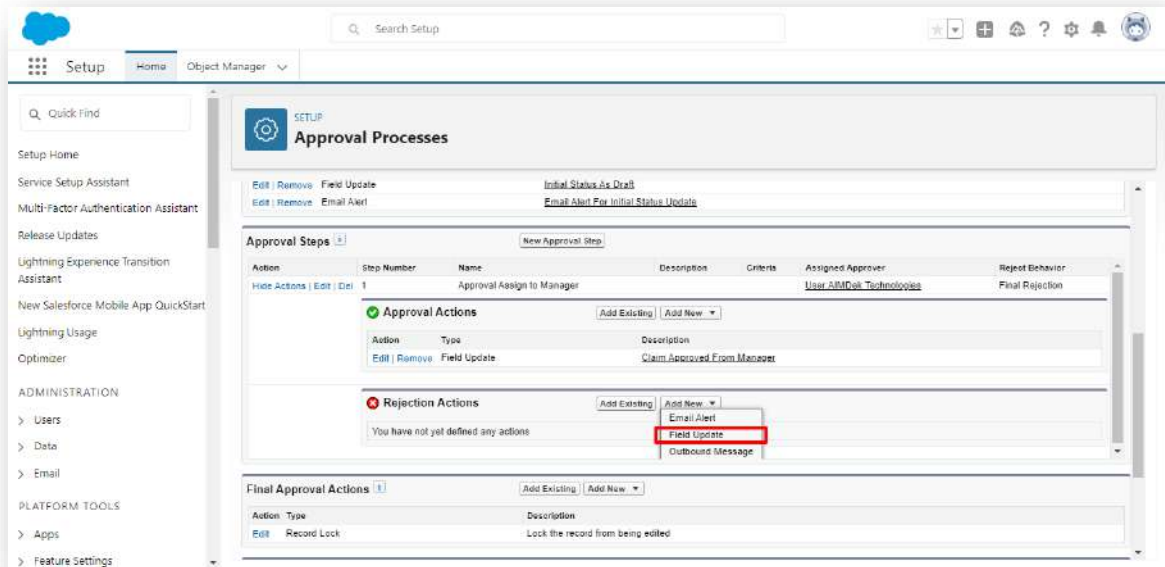
Picklist Options

The value above the current one

The value below the current one

A specific value Approved By Manager

III. From the Rejection Action select "Show Action" then Select "Add New" and Select "Field Update"



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### Approval Processes

Edit Remove Field Update

Edit Remove Email Alert

Initial Status As Draft

Email Alert For Initial Status Update

Approval Steps

New Approval Step

| Action                    | Step Number | Name                       | Description | Criteria | Assigned Approver         | Reject Behavior |
|---------------------------|-------------|----------------------------|-------------|----------|---------------------------|-----------------|
| Hide Actions   Edit   Del | 1           | Approval Assign to Manager |             |          | User: AIMDek Technologies | Final Rejection |

Approval Actions

Add Existing Add New

| Action      | Type         | Description                 |
|-------------|--------------|-----------------------------|
| Edit Remove | Field Update | Claim Approved From Manager |

Rejection Actions

Add Existing Add New

You have not yet defined any actions

Field Update

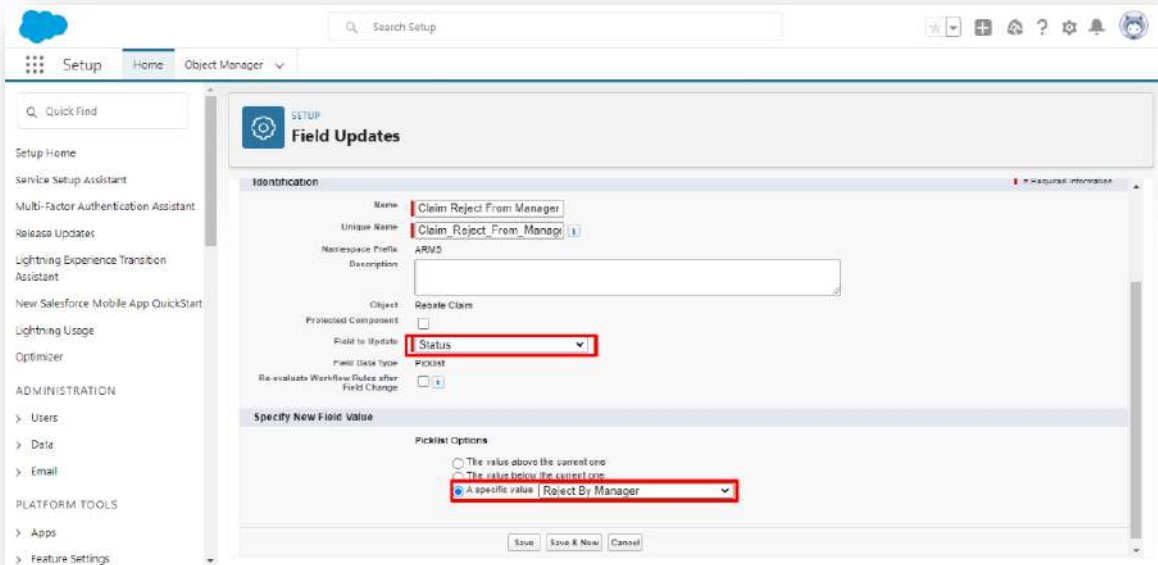
Outbound Message

Final Approval Actions

Add Existing Add New

| Action | Type        | Description                       |
|--------|-------------|-----------------------------------|
| Edit   | Record Lock | Lock the record from being edited |

IV. Enter "Name", "Unique Name" and Select "Status" in Field to Update. Select A specific value as "Rejected by Manager"



**Field Updates**

**Identification**

Name: Claim Reject From Manager

Unique Name: Claim Reject From Manager

Namespace Prefix: ARMS

Description:

Object: Revoke Claim

Protected Component: ☐

Field to Update: Status

Field Data Type: PICKLIST

Re-evaluate Workflow Rules after Field Change: ☐

**Specify New Field Value**

PICKLIST Options

☐ The value above the current one

☐ The value below the current one

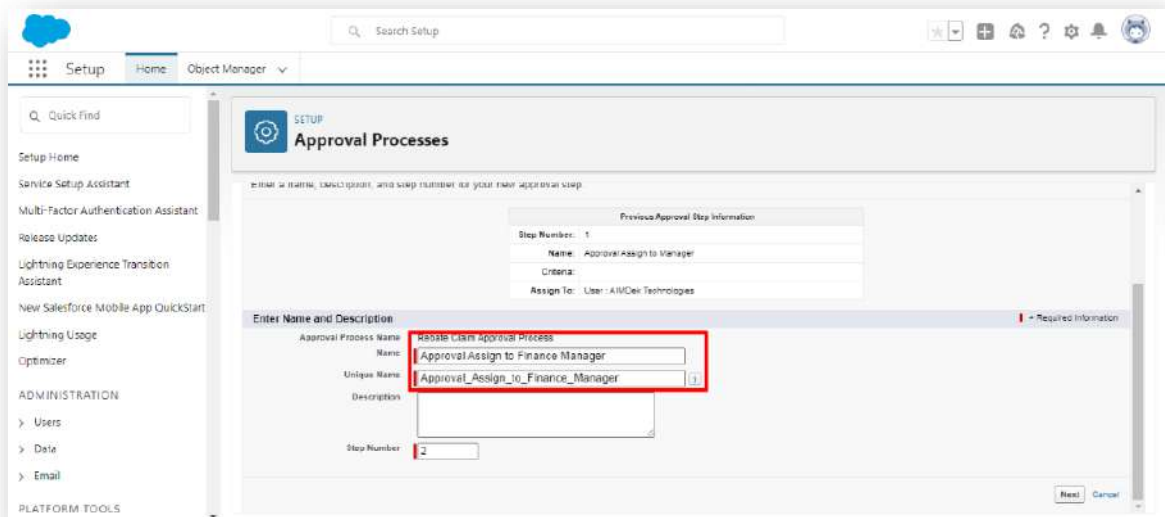
☒ A specific value: Reject By Manager

Buttons: Save, Save & New, Cancel

Press "Save" button. Next step is "Approval Steps".

3.5.10 - From the Approval Steps --> Click on "New Approval Step".

I. Enter "Name" and "Description and Press "Next button.



**Approval Processes**

Enter a name, description, and step number for your first approval step.

**Previous Approval Step Information**

Step Number: 1

Name: Approve Assign to Manager

Criteria: User - AIMDek Technologies

Assign To: User - AIMDek Technologies

**Enter Name and Description**

Approval Process Name: Approve Claim Approval Process

Name: ApprovalAssign to Finance Manager

Unique Name: Approval\_Assign\_to\_Finance\_Manager

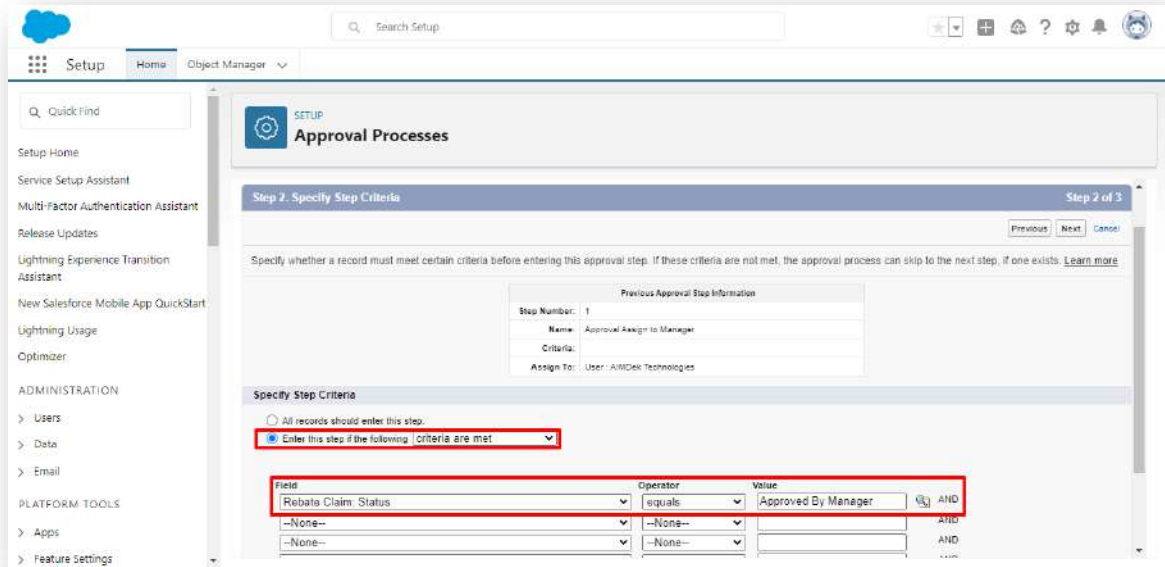
Description:

Step Number: 2

Buttons: Next, Cancel

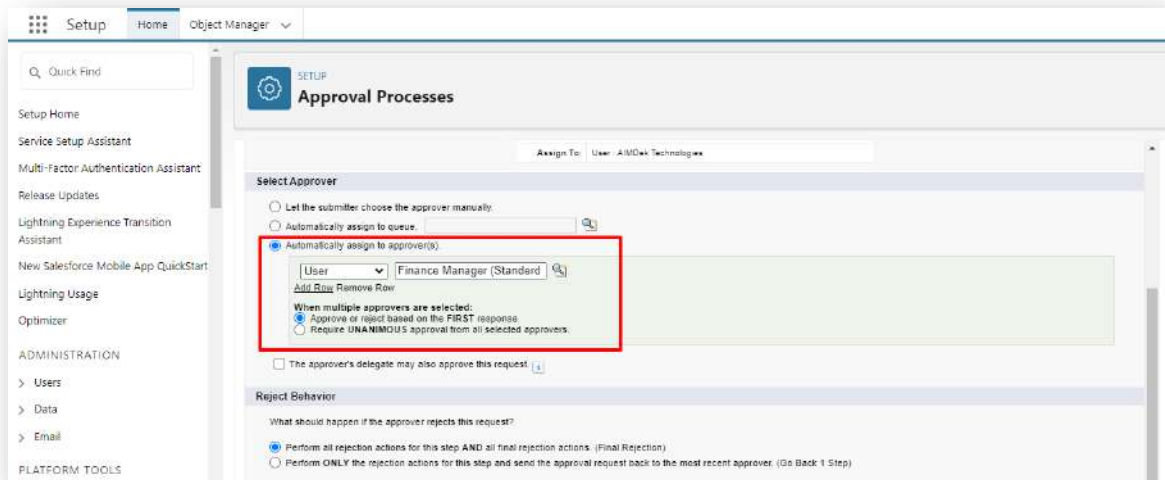
II. From the "Specify Step Criteria" --> select Enter this step if the following criteria are met from the dropdown.

Then select Fields, Operator and Value as shown in the below figure.



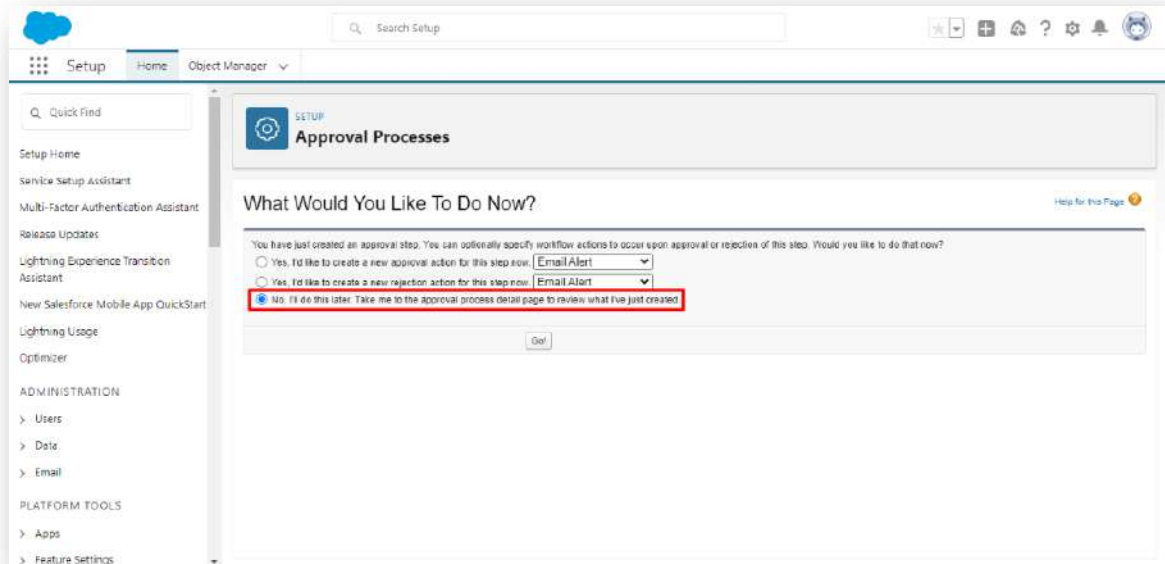
Press Next

III. From the Select Approver --> Select Automatically assign to approver(s). Then select User and add Finance Manager (Standard User) from the dropdown. And then select the below mentioned options from the figure.



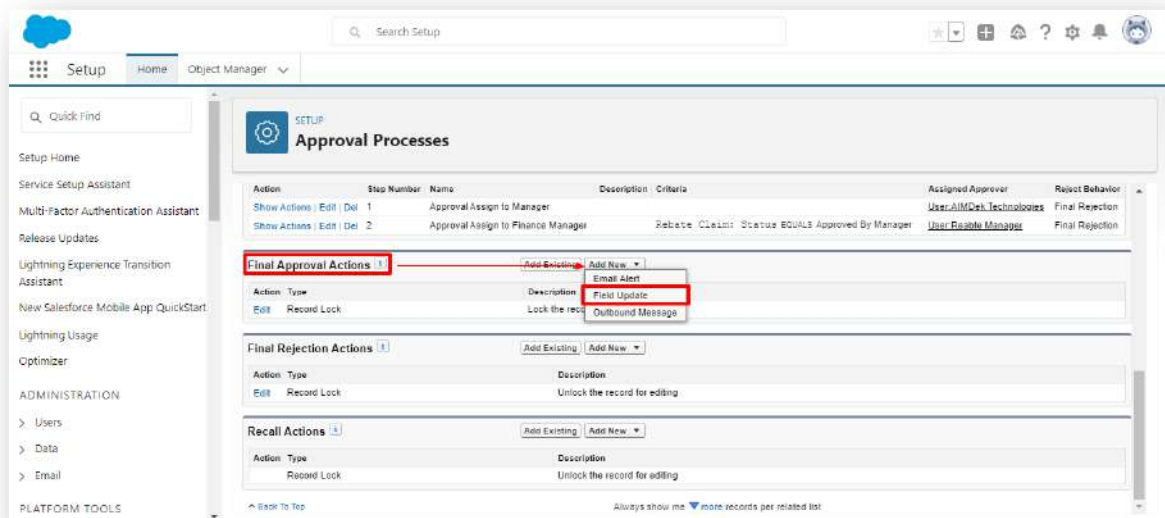
Press “Save”.

IV. Select option "No, I'll do this later. Take me to the approval process detail page to review what I've just created".

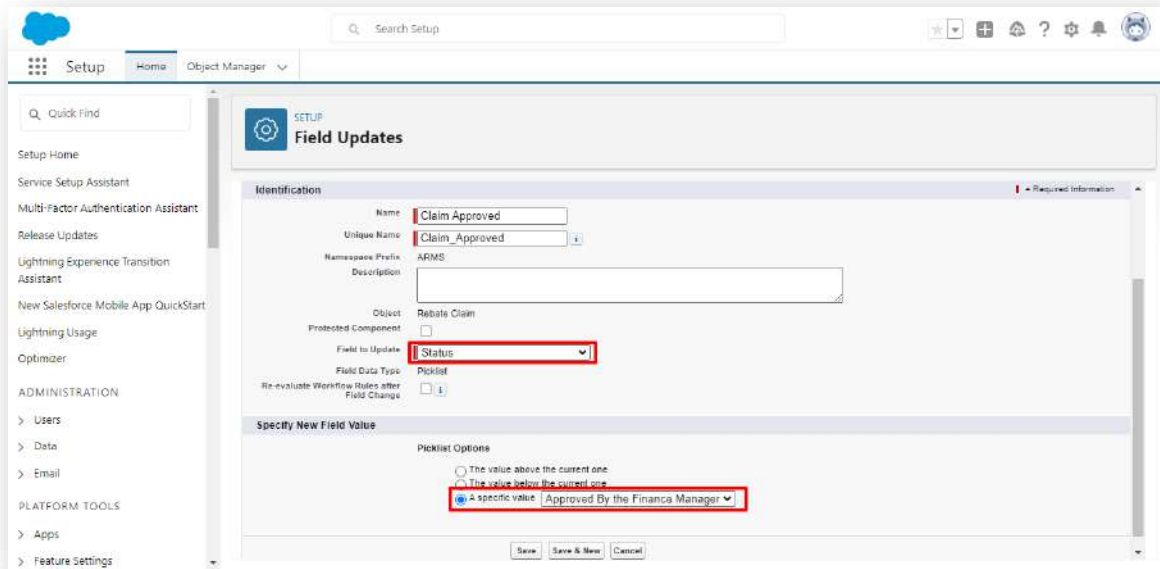


Click on “Go” button.

3.5.11 - From the Final Approval Actions -> From the Add New dropdown -> Select Field Update



- Name -> Final Approval from Finance Manager
- Field to Update -> Status
- Specify New Field Value -> Approved by Finance Manager



Press “Save” button.

3.5.12 From the Final Approval Actions -> From the Add New dropdown -> Select Email Alert



[Setup](#)
[Home](#)
[Object Manager](#)

[Setup Home](#)  
[Service Setup Assistant](#)  
[Multi-Factor Authentication Assistant](#)  
[Release Updates](#)  
[Lightning Experience Transition Assistant](#)  
[New Salesforce Mobile App QuickStart](#)  
[Lightning Usage](#)  
[Optimizer](#)  
**ADMINISTRATION**  
[Users](#)  
[Data](#)  
[Email](#)  
**PLATFORM TOOLS**  
[Apps](#)  
[Feature Settings](#)

## Approval Processes

[New Approval Step](#)

| Action                                                                    | Step Number | Name                               | Description | Criteria                                           | Assigned Approver       | Reject Behavior |
|---------------------------------------------------------------------------|-------------|------------------------------------|-------------|----------------------------------------------------|-------------------------|-----------------|
| <a href="#">Show Actions</a>   <a href="#">Edit</a>   <a href="#">Del</a> | 1           | Approval Assign to Manager         |             |                                                    | User:AIMDekTechnologies | Final Rejection |
| <a href="#">Show Actions</a>   <a href="#">Edit</a>   <a href="#">Del</a> | 2           | Approval Assign to Finance Manager |             | Rebate - (Claim) Status EQUALS Approved By Manager | User:Finance Manager    | Final Rejection |

**Final Approval Actions** | [Add Existing](#) | [Add New](#)

| Action                                        | Type             | Description      |
|-----------------------------------------------|------------------|------------------|
| <a href="#">Edit</a>   <a href="#">Remove</a> | Record Lock      | Lock the record  |
| <a href="#">Edit</a>   <a href="#">Remove</a> | Field Update     | Field Update     |
| <a href="#">Edit</a>   <a href="#">Remove</a> | Outbound Message | Outbound Message |
| <a href="#">Edit</a>   <a href="#">Remove</a> | Claim Approval   | Claim Approval   |

**Final Rejection Actions** | [Add Existing](#) | [Add New](#)

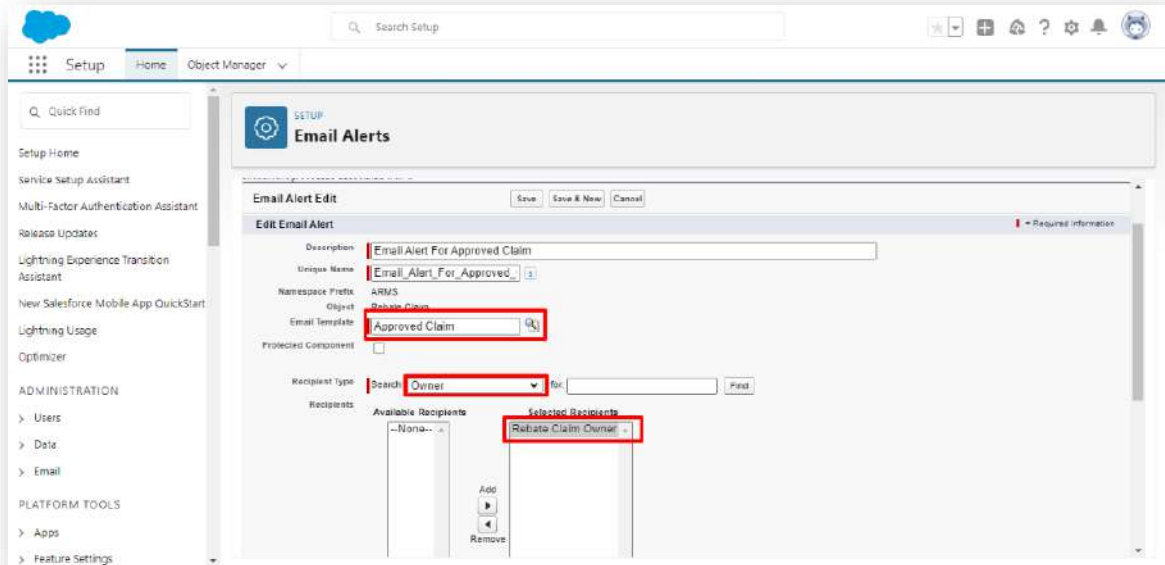
| Action               | Type        | Description                   |
|----------------------|-------------|-------------------------------|
| <a href="#">Edit</a> | Record Lock | Unlock the record for editing |

**Recall Actions** | [Add Existing](#) | [Add New](#)

| Action               | Type        | Description                   |
|----------------------|-------------|-------------------------------|
| <a href="#">Edit</a> | Record Lock | Unlock the record for editing |

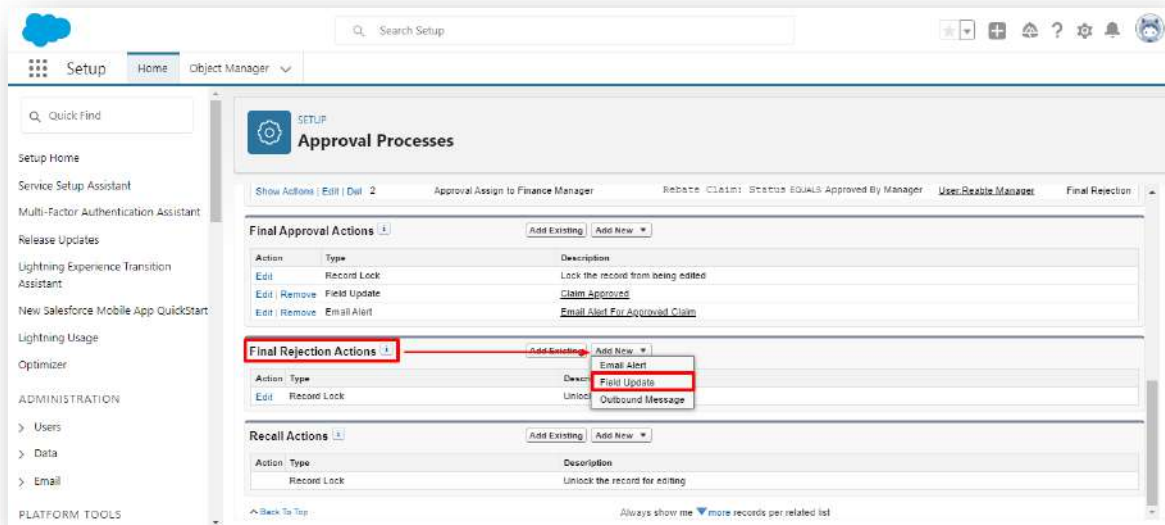
[Back to Top](#) | Always show me [more records](#) per related list

- Give Description, Unique Name
- Select Email Template
- Classic -> Rebate Management Template -> Approved Claim Templates
- Search: User -> Select and Add Finance Manager (Standard User)

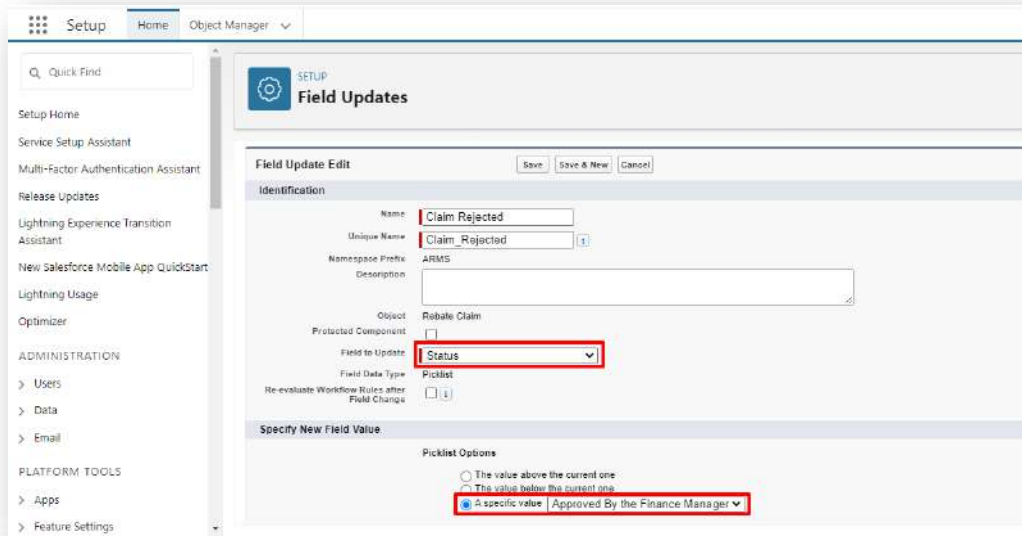


Press “Save”.

3.5.13 - From the Final Rejection Actions -> From the Add New dropdown -> Select Field Update

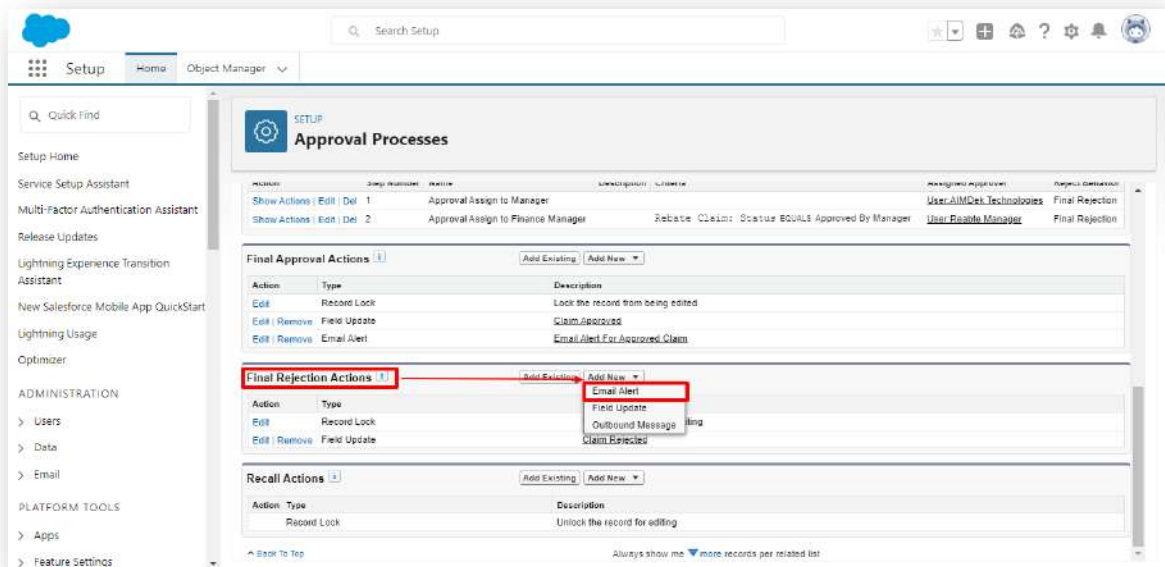


- Name -> Final Rejected from Finance Manager
- Field to Update -> Status
- Specify New Field Value -> Rejected by Finance Manager



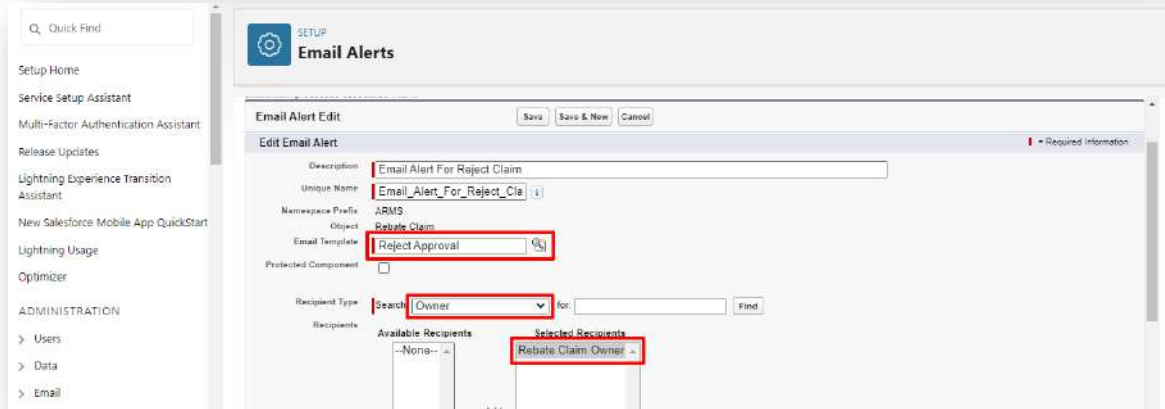
Press “Save” button.

I. From the Final Rejection Actions -> From the Add New dropdown -> Select Email Alert



- Give Description, Unique Name

- Select Email Template
- Classic -> Rebate Management Template -> Reject Approval Templates
- Search: User -> Select and Add Finance Manager (Standard User)



Quick Find

Setup Home  
Service Setup Assistant  
Multi-Factor Authentication Assistant  
Release Updates  
Lightning Experience Transition Assistant  
New Salesforce Mobile App QuickStart  
Lightning Usage  
Optimizer  
ADMINISTRATION  
Users  
Data  
Email

SETUP  
**Email Alerts**

Email Alert Edit [Save] [Save & New] [Cancel]

**Edit Email Alert** [Required Information]

Description: Email Alert For Reject Claim  
Unique Name: Email\_Alert\_For\_Reject\_Cla  
Namespace Prefix: ARMS  
Object: Rebate Claim  
Email Template: Reject Approval  
Protected Component: ☐

Recipient Type: Search: Owner for: Find

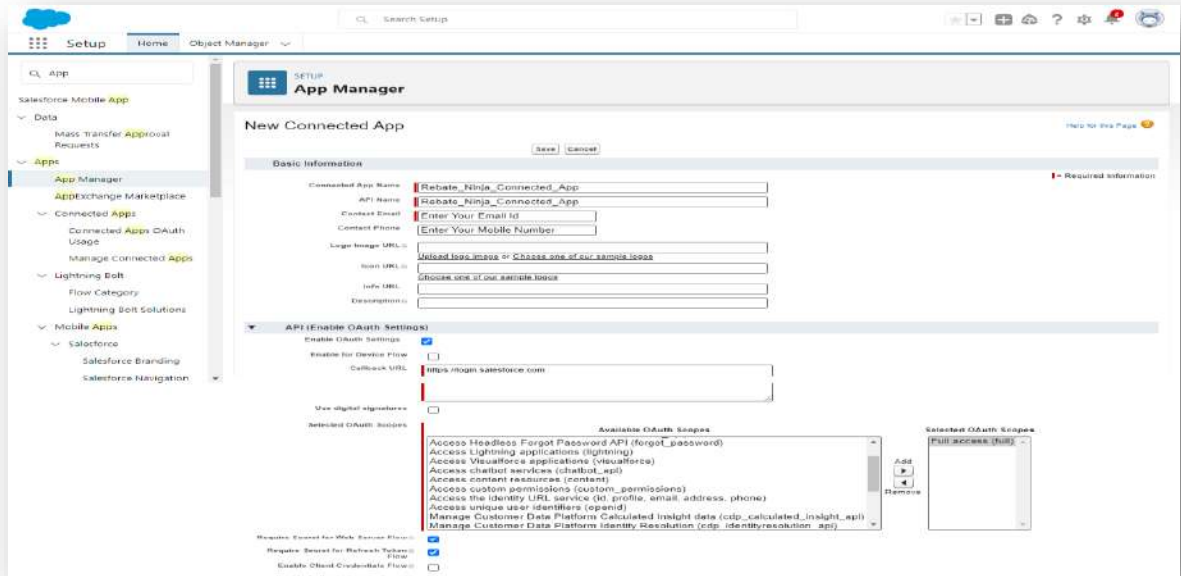
Recipients

| Available Recipients | Selected Recipients |
|----------------------|---------------------|
| None                 | Rebate Claim Owner  |

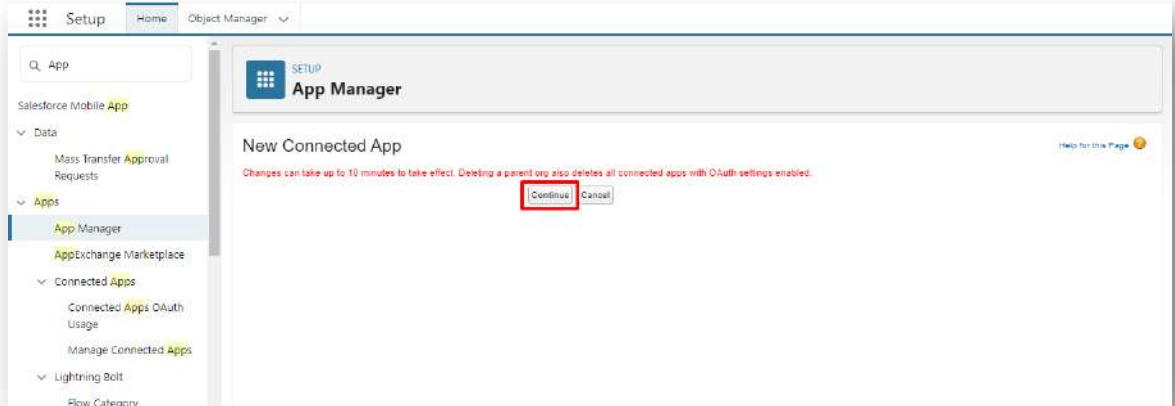
Press “Save” button

### 3.6. Steps for creating connected App and Name Cred.

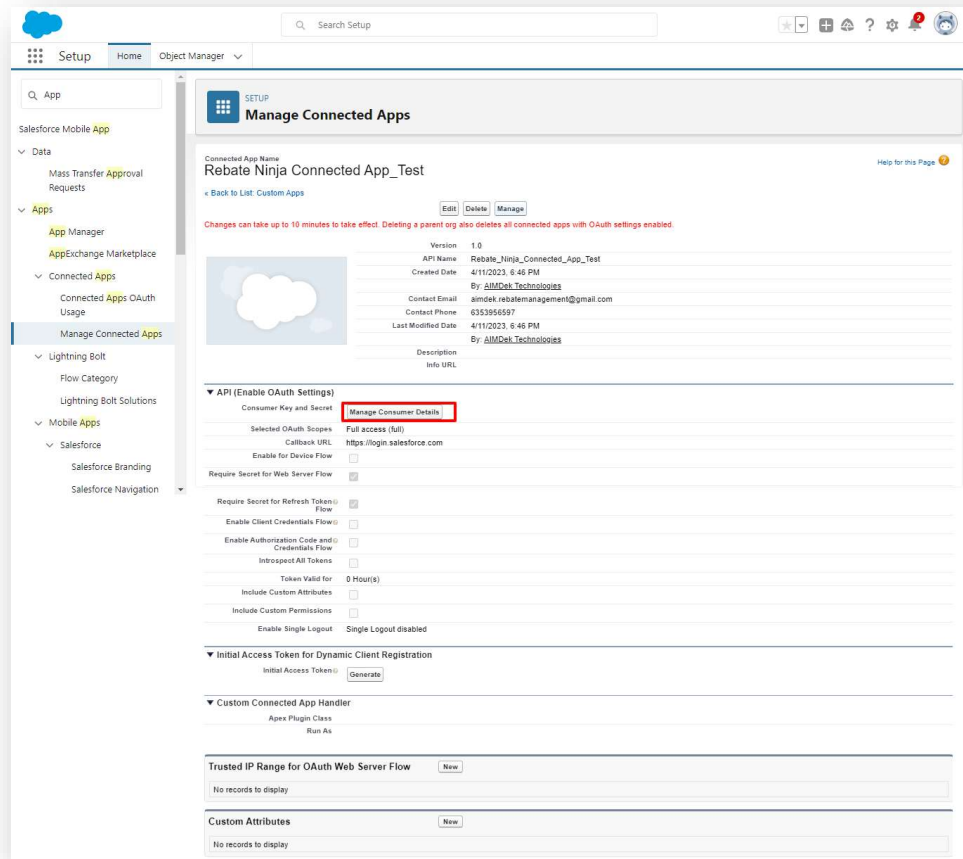
1. Go to setup
2. Search 'App Manager' in Quick Find and select it.
3. Click on 'New Connected App' button on Top right of the page.
4. Fill all the fields same as the image below.



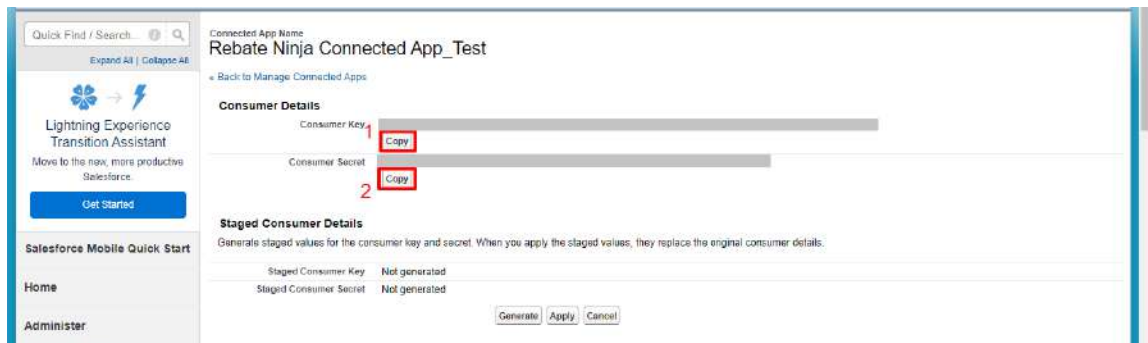
5. Click on the “Save” button.



6. Click on the “Continue” button.



7. Click on the “Manage Consumer Details” button.

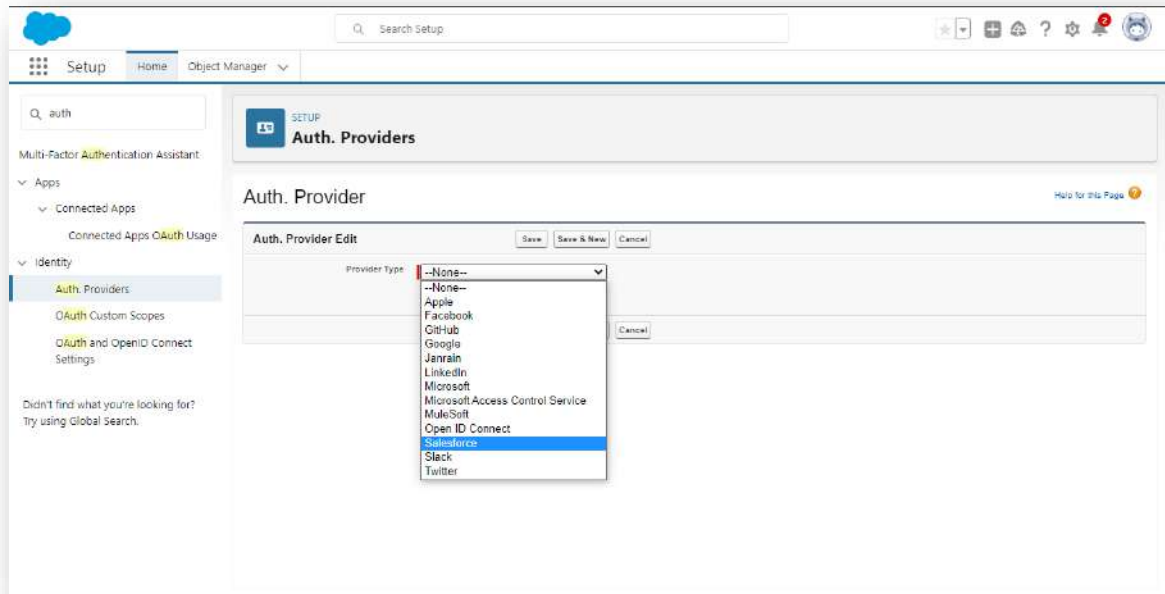


8. copy the “Consumer Key” and “Consumer Secret”

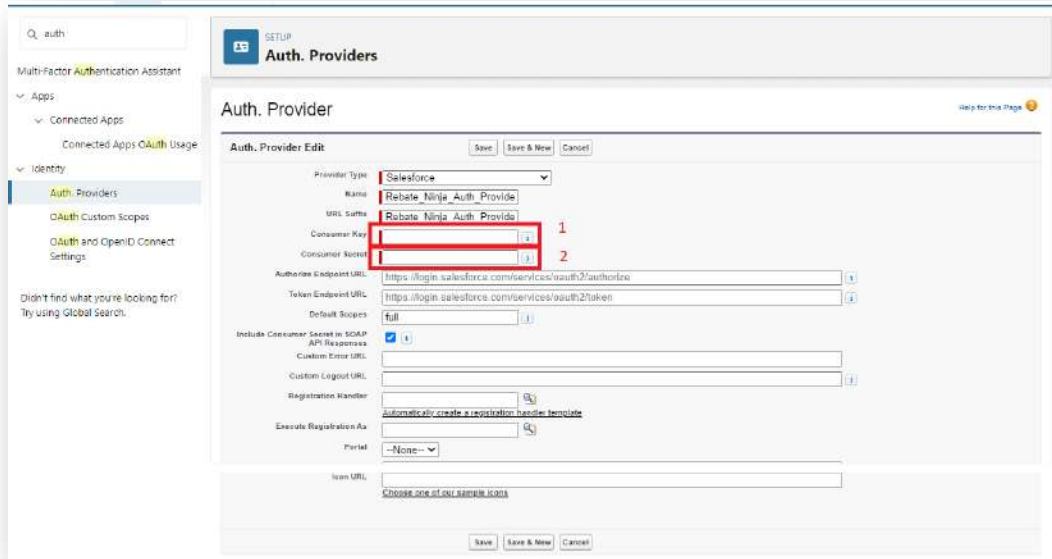
9. Go to setup

10. Search 'Auth providers' in Quick Find and select it.

11. Select 'Salesforce' from the Provider Type.



12. Fill all the fields same as the image below.



Auth. Provider Edit

Provider Type: Salesforce

Name: Rebate\_Ninja\_Auth\_Provide

URL Suffix: Rebate\_Ninja\_Auth\_Provide

Consumer Key: [Redacted] 1

Consumer Secret: [Redacted] 2

Authorize Endpoint URL: https://login.salesforce.com/services/oauth2/authorize

Token Endpoint URL: https://login.salesforce.com/services/oauth2/token

Default Scopes: full

Include Consumer Secret in SOAP API Responses: ☒

Custom Error URL: [Empty]

Custom Logout URL: [Empty]

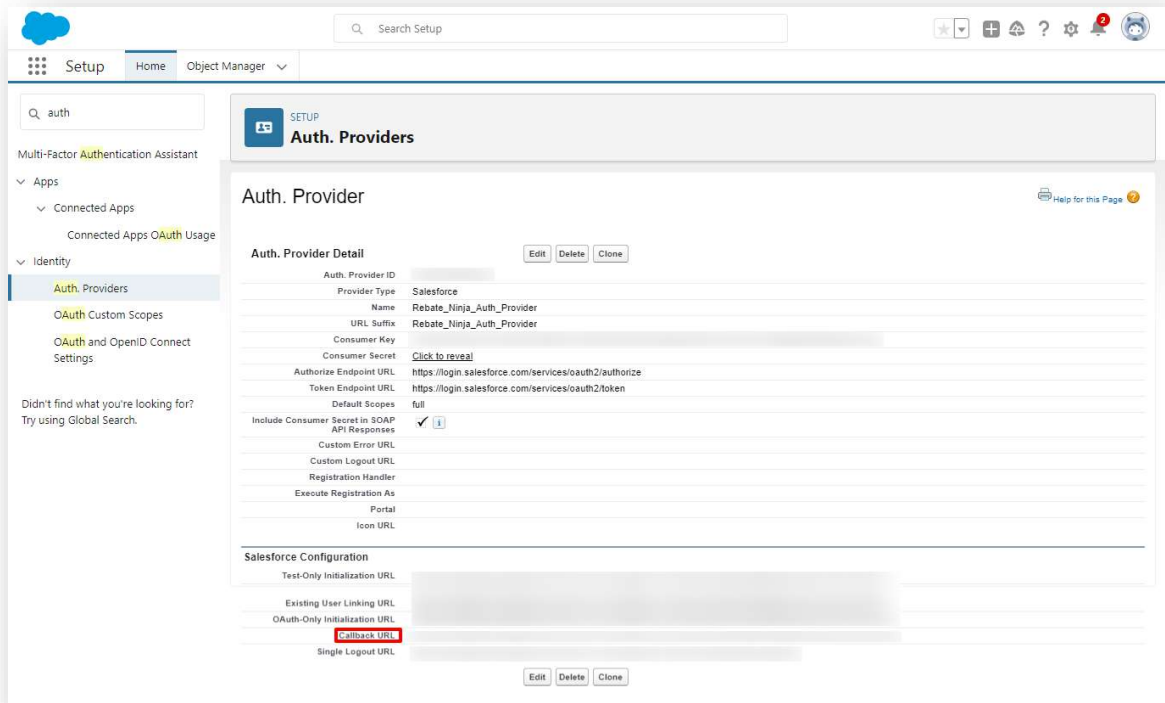
Registration Handler: [Empty]

Execute Registration As: Automatically create a registration handler template

Portal: --None--

Icon URL: [Empty]

13. Paste the ‘Consumer Key’ and ‘Consumer Secret’ which were copied from the [Step-8] and Press ‘Save’.



Auth. Provider Detail

Auth. Provider ID: [Redacted]

Provider Type: Salesforce

Name: Rebate\_Ninja\_Auth\_Provide

URL Suffix: Rebate\_Ninja\_Auth\_Provide

Consumer Key: [Redacted]

Consumer Secret: [Redacted]

Authorize Endpoint URL: https://login.salesforce.com/services/oauth2/authorize

Token Endpoint URL: https://login.salesforce.com/services/oauth2/token

Default Scopes: full

Include Consumer Secret in SOAP API Responses: ☒

Custom Error URL: [Empty]

Custom Logout URL: [Empty]

Registration Handler: [Empty]

Execute Registration As: [Empty]

Portal: [Empty]

Icon URL: [Empty]

Salesforce Configuration

Test-Only Initialization URL: [Redacted]

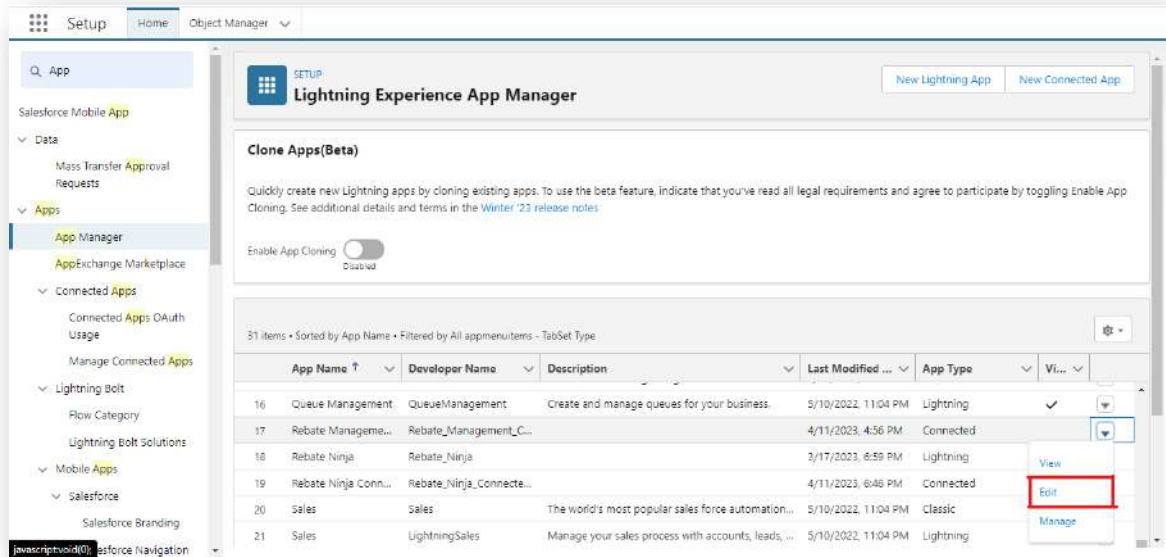
Existing User Linking URL: [Redacted]

OAuth-Only Initialization URL: [Redacted]

callback URL: [Redacted]

Single Logout URL: [Redacted]

14. Select the Auth. Providers that user created, and Copy the Callback URL as mentioned above.
15. Go to setup and Search 'App Manager' in Quick Find and select it.
16. Select Connected App that you created earlier and click 'Edit'.



**Lightning Experience App Manager**

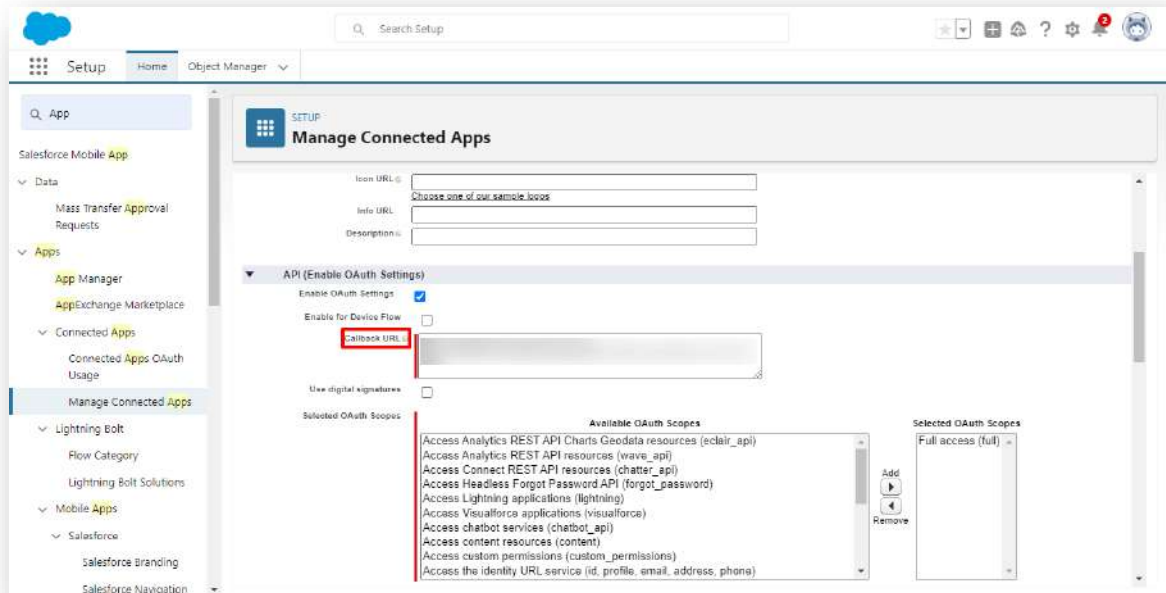
**Clone Apps(Beta)**

Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling **Enable App Cloning**. See additional details and terms in the [Winter '23 release notes](#).

Enable App Cloning ☐ Disabled

31 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

|    | App Name             | Developer Name           | Description                                         | Last Modified       | App Type  | View   |
|----|----------------------|--------------------------|-----------------------------------------------------|---------------------|-----------|--------|
| 16 | Queue Management     | QueueManagement          | Create and manage queues for your business.         | 5/10/2022, 11:04 PM | Lightning | ✓      |
| 17 | Rebate Manageme...   | Rebate_Management_C...   |                                                     | 4/11/2023, 4:56 PM  | Connected | ⌵      |
| 18 | Rebate Ninja         | Rebate_Ninja             |                                                     | 3/17/2023, 6:59 PM  | Lightning | View   |
| 19 | Rebate Ninja Conn... | Rebate_Ninja_Connecte... |                                                     | 4/11/2023, 6:46 PM  | Connected | Edit   |
| 20 | Sales                | Sales                    | The world's most popular sales force automation...  | 5/10/2022, 11:04 PM | Classic   | Manage |
| 21 | Sales                | LightningSales           | Manage your sales process with accounts, leads, ... | 5/10/2022, 11:04 PM | Lightning |        |



**Manage Connected Apps**

Icon URL:

Info URL:

Description:

**API (Enable OAuth Settings)**

Enable OAuth Settings ☒

Enable for Device Flow ☐

Callback URL:

Use digital signatures ☐

Selected OAuth Scopes

Available OAuth Scopes

- Access Analytics REST API Charts Geodata resources (eclair\_api)
- Access Analytics REST API resources (wave\_api)
- Access Connect REST API resources (chatter\_api)
- Access Headless Forgot Password API (forgot\_password)
- Access Lightning applications (lightning)
- Access Visualforce applications (visualforce)
- Access chatbot services (chatbot\_api)
- Access content resources (content)
- Access custom permissions (custom\_permissions)
- Access the identity URL service (id, profile, email, address, phone)

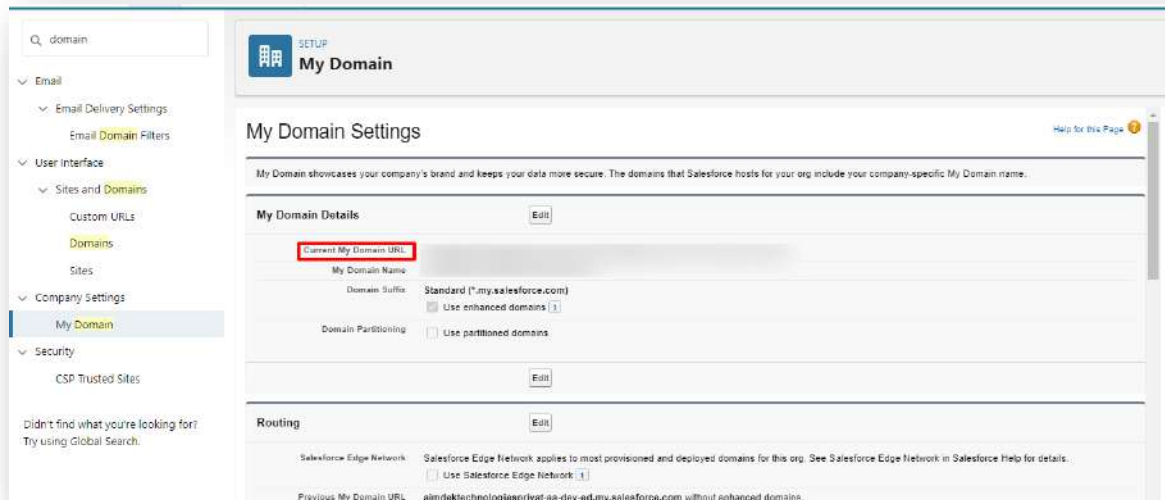
Selected OAuth Scopes

Full access (full)

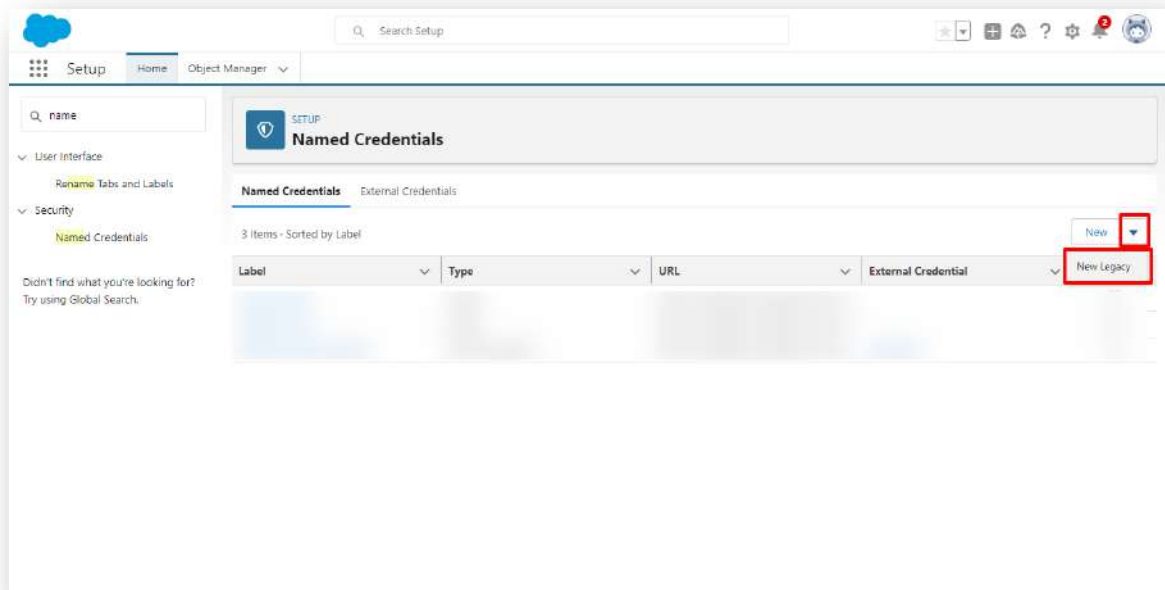
17. Paste the URL which was copied in [Step –14] and Press ‘Save’.

18 Go to setup and Search ‘My domain’ in Quick Find and select it.

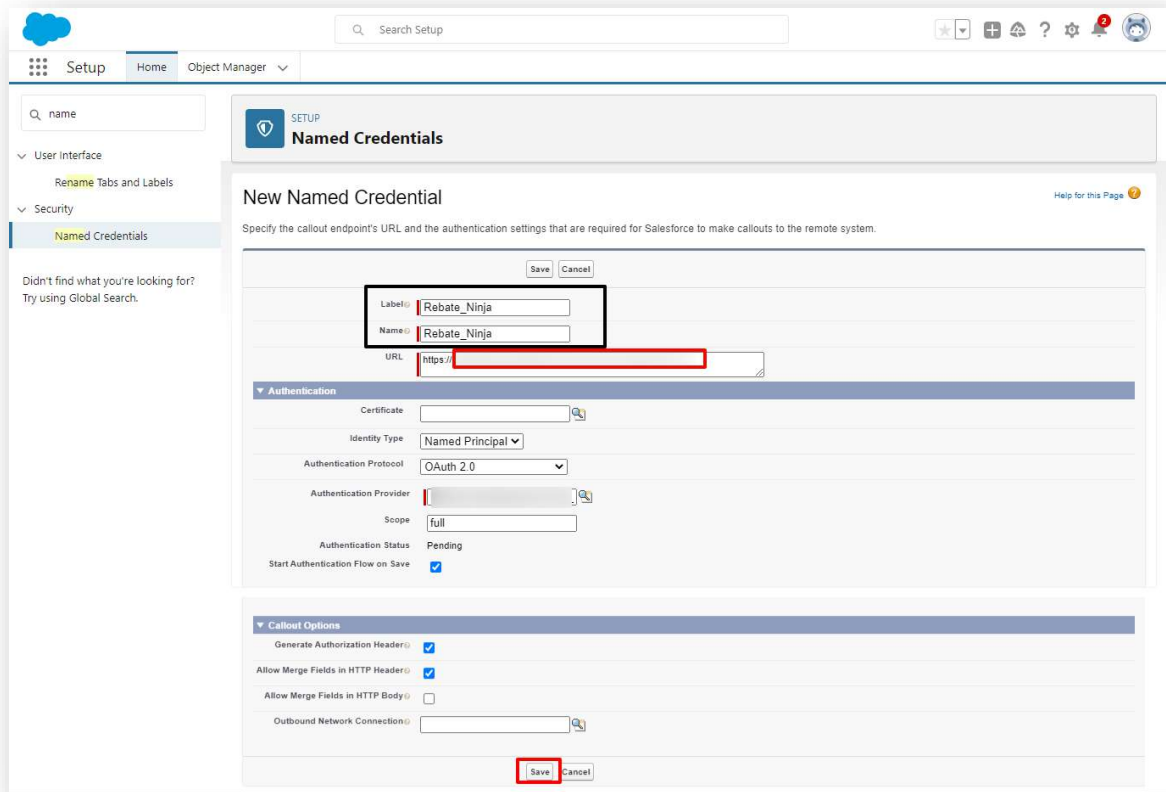
19. Copy ‘Current My domain URL’.



20. Go to Setup and Search ‘Named Credentials’ in Quick Find and select it.



21. Go to 'New Legacy' as shown above.



Search Setup

Setup Home Object Manager

name

User Interface

Rename Tabs and Labels

Security

Named Credentials

Didn't find what you're looking for?  
Try using Global Search.

### Named Credentials

#### New Named Credential

Specify the callout endpoint's URL and the authentication settings that are required for Salesforce to make callouts to the remote system.

Save Cancel

Label: Rebate\_Ninja

Name: Rebate\_Ninja

URL: https://

**Authentication**

Certificate

Identity Type: Named Principal

Authentication Protocol: OAuth 2.0

Authentication Provider

Scope: full

Authentication Status: Pending

Start Authentication Flow on Save: ☒

**Callout Options**

Generate Authorization Header: ☒

Allow Merge Fields in HTTP Header: ☒

Allow Merge Fields in HTTP Body: ☐

Outbound Network Connection

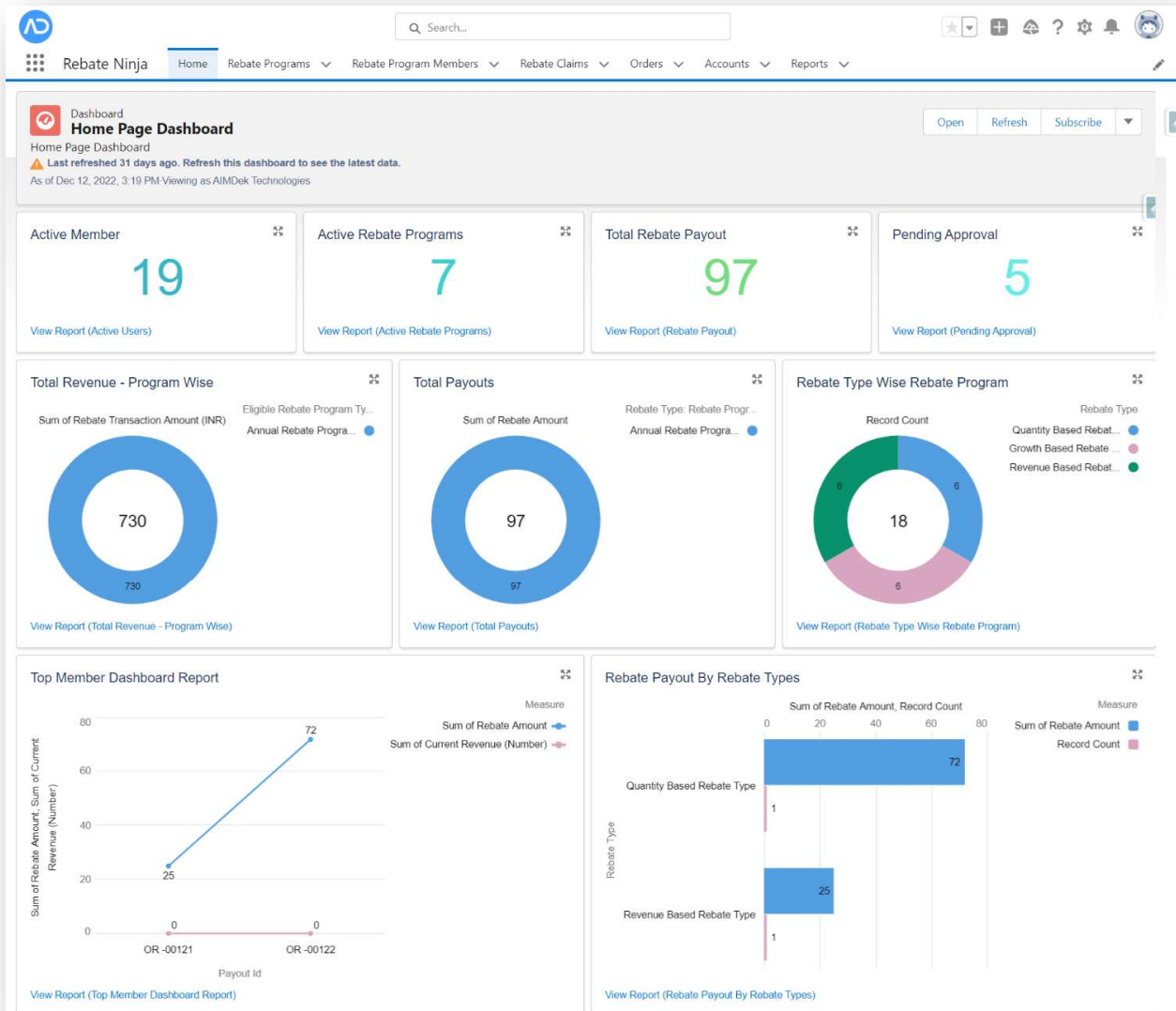
Save Cancel

22. Set the Label and Name values as '**Rebate\_Ninja**', Paste the URL which was copied in [Step-19] with prefix 'https://' and. press 'Save'.

## 4. Web application

Rebate Ninja can be accessed by using a web browser. The user just needs to log into its Salesforce organization and look for the Rebate Ninja application in the Force.com menu.

### 4.1 Home Screen

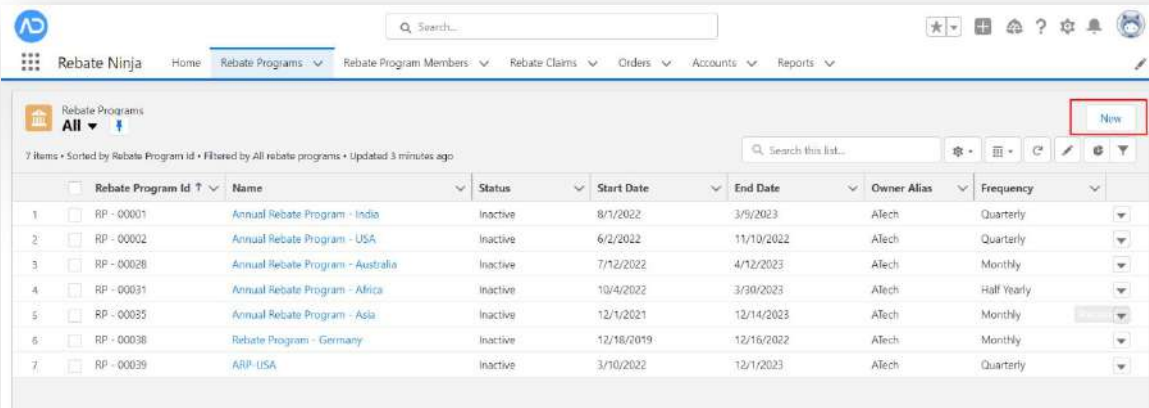


This dashboard includes several essential pieces of information for the entire system. This shows the following sections on this tab filtered for the user that is logged in Active Members, Active Rebate Programs, Total Rebate Payouts, pending approval, Total revenue, Total payouts, rebate type wise rebate program and more customized options users can select as per their choice.

## 4.2 Rebate Programs

When “Rebate Programs” tab is selected, default screen will appear listing all the rebate programs

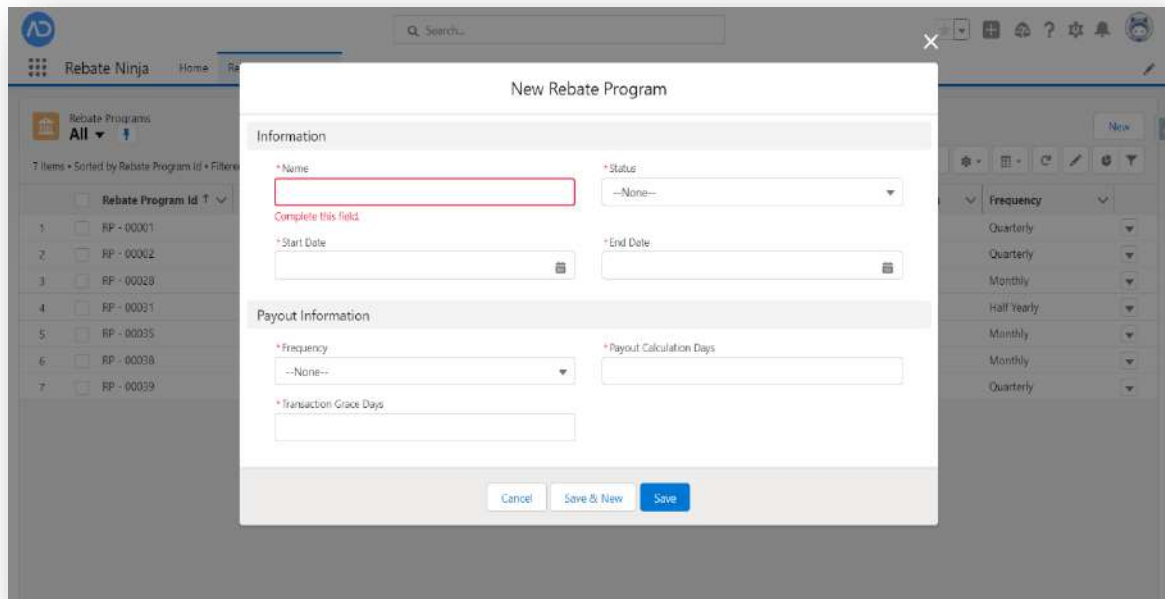
that the user has



|   | Rebate Program Id | Name                              | Status   | Start Date | End Date   | Owner Alias | Frequency   |
|---|-------------------|-----------------------------------|----------|------------|------------|-------------|-------------|
| 1 | RP - 00001        | Annual Rebate Program - India     | Inactive | 8/1/2022   | 3/9/2023   | ATech       | Quarterly   |
| 2 | RP - 00002        | Annual Rebate Program - USA       | Inactive | 6/2/2022   | 11/10/2022 | ATech       | Quarterly   |
| 3 | RP - 00028        | Annual Rebate Program - Australia | Inactive | 7/12/2022  | 4/12/2023  | ATech       | Monthly     |
| 4 | RP - 00031        | Annual Rebate Program - Africa    | Inactive | 10/4/2022  | 3/30/2023  | ATech       | Half Yearly |
| 5 | RP - 00035        | Annual Rebate Program - Asia      | Inactive | 12/1/2021  | 12/14/2023 | ATech       | Monthly     |
| 6 | RP - 00038        | Rebate Program - Germany          | Inactive | 12/18/2019 | 12/16/2022 | ATech       | Monthly     |
| 7 | RP - 00039        | ARIP - USA                        | Inactive | 3/10/2022  | 12/1/2023  | ATech       | Quarterly   |

created.

### 4.2.1 Create New Rebate Program



**New Rebate Program**

**Information**

\* Name  \* Status

Complete this field.

\* Start Date  \* End Date

**Payout Information**

\* Frequency  \* Payout Calculation Days

\* Transaction Grace Days

Cancel Save & New Save

There is an option at the top right for creating a “New” rebate program. The new rebate program creation page will ask for the details below:

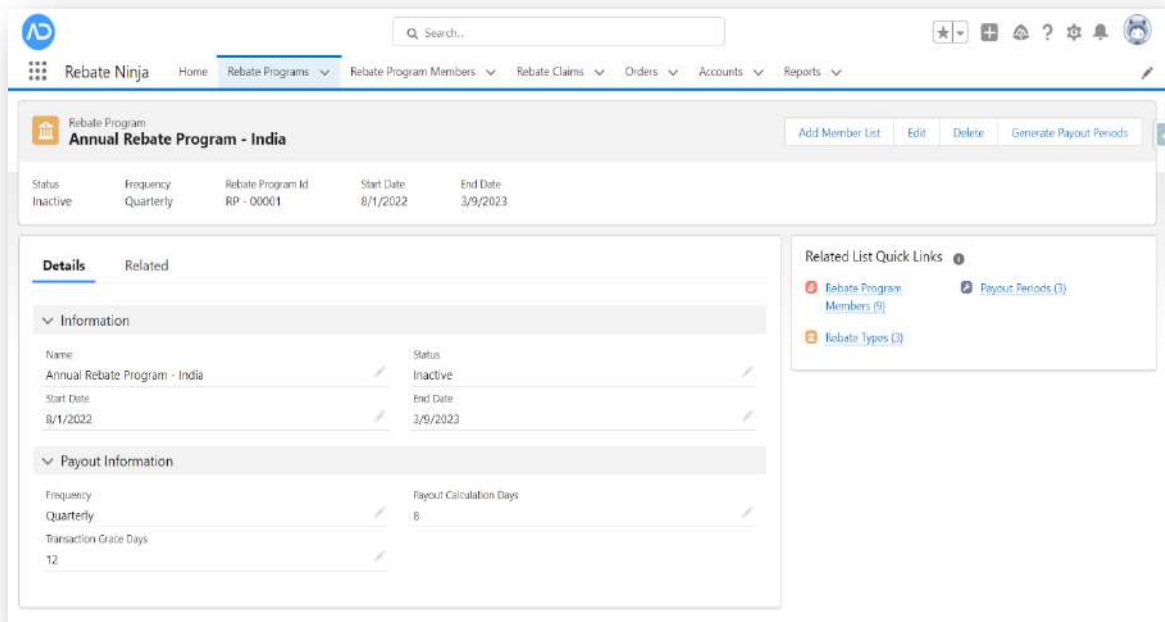
- Information.
- Payout Information.

In the “Payout Information” section, there is an option to select “Payout Calculation Days” and “Transaction Grace Days”.

Here the frequency of the payouts and grace period and when it will be calculated will be displayed

- Frequency: Monthly/ Quarterly/Half Yearly/Yearly
- Payout Calculation Days: 10 (When will the payout be calculated after the transaction grace period is ended)
- Transaction Grace Period: 5 (The number of days after the program end date the transactions can be submitted)

#### 4.2.2 Rebate Program Details



The screenshot shows the 'Rebate Ninja' dashboard. The main header includes a search bar and navigation links: Home, Rebate Programs, Rebate Program Members, Rebate Claims, Orders, Accounts, and Reports. The 'Rebate Programs' section is active, displaying a table with one program: 'Annual Rebate Program - India'. The program details are as follows:

| Status   | Frequency | Rebate Program Id | Start Date | End Date |
|----------|-----------|-------------------|------------|----------|
| Inactive | Quarterly | RP - 00001        | 8/1/2022   | 3/9/2023 |

Below the table, there are two tabs: 'Details' and 'Related'. The 'Details' tab is selected, showing the following information:

- Information**
  - Name: Annual Rebate Program - India
  - Status: Inactive
  - Start Date: 8/1/2022
  - End Date: 3/9/2023
- Payout Information**
  - Frequency: Quarterly
  - Payout Calculation Days: 8
  - Transaction Grace Days: 12

On the right side, there is a 'Related List Quick Links' section with links to 'Rebate Program Members (9)', 'Payout Periods (3)', and 'Rebate Types (3)'.

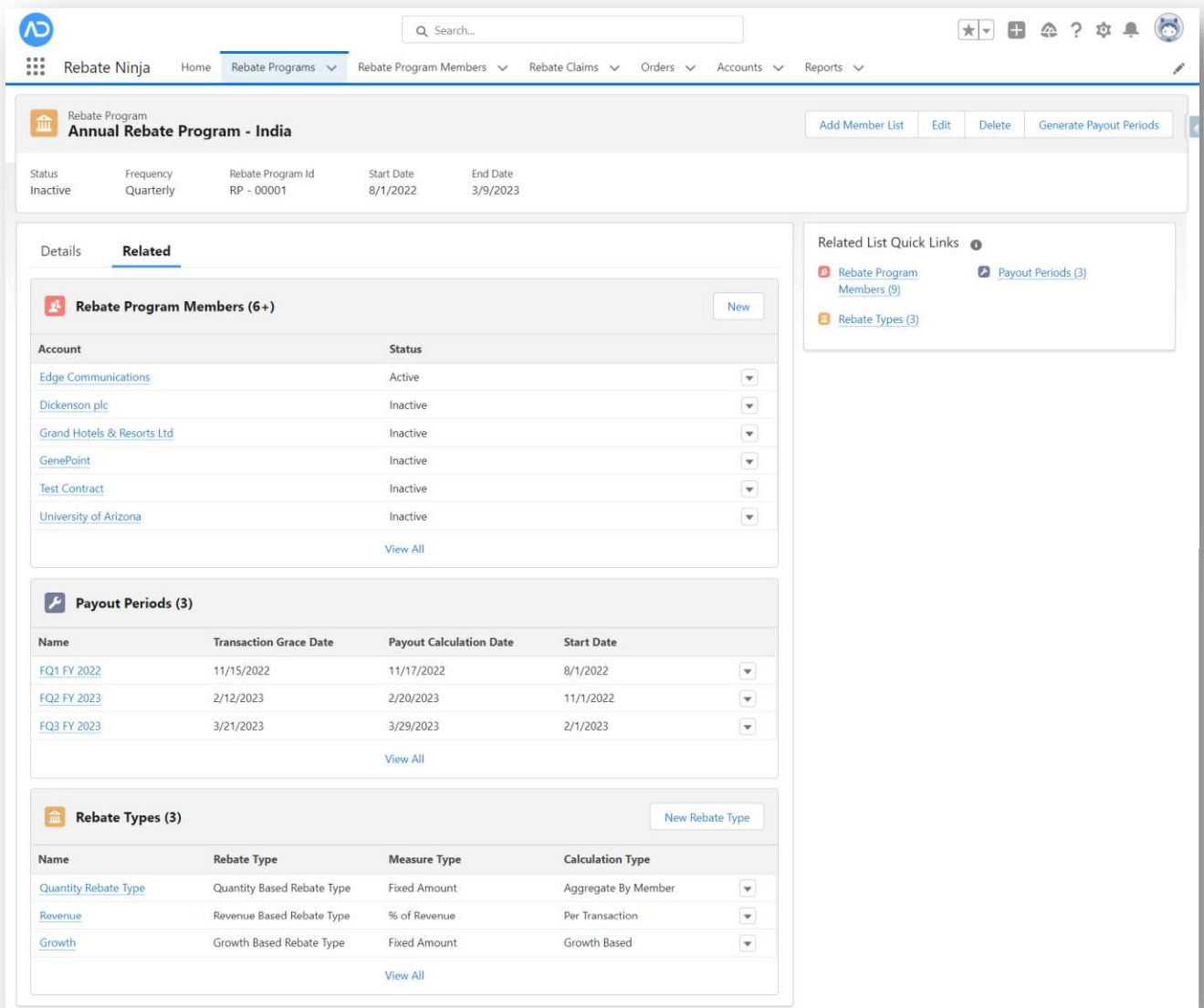
Upon clicking on a particular rebate program from the listing page, this page will be displayed along with all the detailed information about the selected rebate program. The Details tab consists of some more sub-sections as below:

- Details
- Related

##### Details Tab:

Here the status of the rebate program can also be viewed as either “draft”, “Active” or “Inactive”.

## Related Tab:



**Rebate Program**  
**Annual Rebate Program - India**

Status: Inactive | Frequency: Quarterly | Rebate Program Id: RP - 00001 | Start Date: 8/1/2022 | End Date: 3/9/2023

Buttons: Add Member List, Edit, Delete, Generate Payout Periods

**Details** | **Related**

**Rebate Program Members (6+)** [New](#)

| Account                                        | Status   |
|------------------------------------------------|----------|
| <a href="#">Edge Communications</a>            | Active   |
| <a href="#">Dickenson plc</a>                  | Inactive |
| <a href="#">Grand Hotels &amp; Resorts Ltd</a> | Inactive |
| <a href="#">GenePoint</a>                      | Inactive |
| <a href="#">Test Contract</a>                  | Inactive |
| <a href="#">University of Arizona</a>          | Inactive |

[View All](#)

**Payout Periods (3)**

| Name                        | Transaction Grace Date | Payout Calculation Date | Start Date |
|-----------------------------|------------------------|-------------------------|------------|
| <a href="#">FQ1 FY 2022</a> | 11/15/2022             | 11/17/2022              | 8/1/2022   |
| <a href="#">FQ2 FY 2023</a> | 2/12/2023              | 2/20/2023               | 11/1/2022  |
| <a href="#">FQ3 FY 2023</a> | 3/21/2023              | 3/29/2023               | 2/1/2023   |

[View All](#)

**Rebate Types (3)** [New Rebate Type](#)

| Name                                 | Rebate Type                | Measure Type | Calculation Type    |
|--------------------------------------|----------------------------|--------------|---------------------|
| <a href="#">Quantity Rebate Type</a> | Quantity Based Rebate Type | Fixed Amount | Aggregate By Member |
| <a href="#">Revenue</a>              | Revenue Based Rebate Type  | % of Revenue | Per Transaction     |
| <a href="#">Growth</a>               | Growth Based Rebate Type   | Fixed Amount | Growth Based        |

[View All](#)

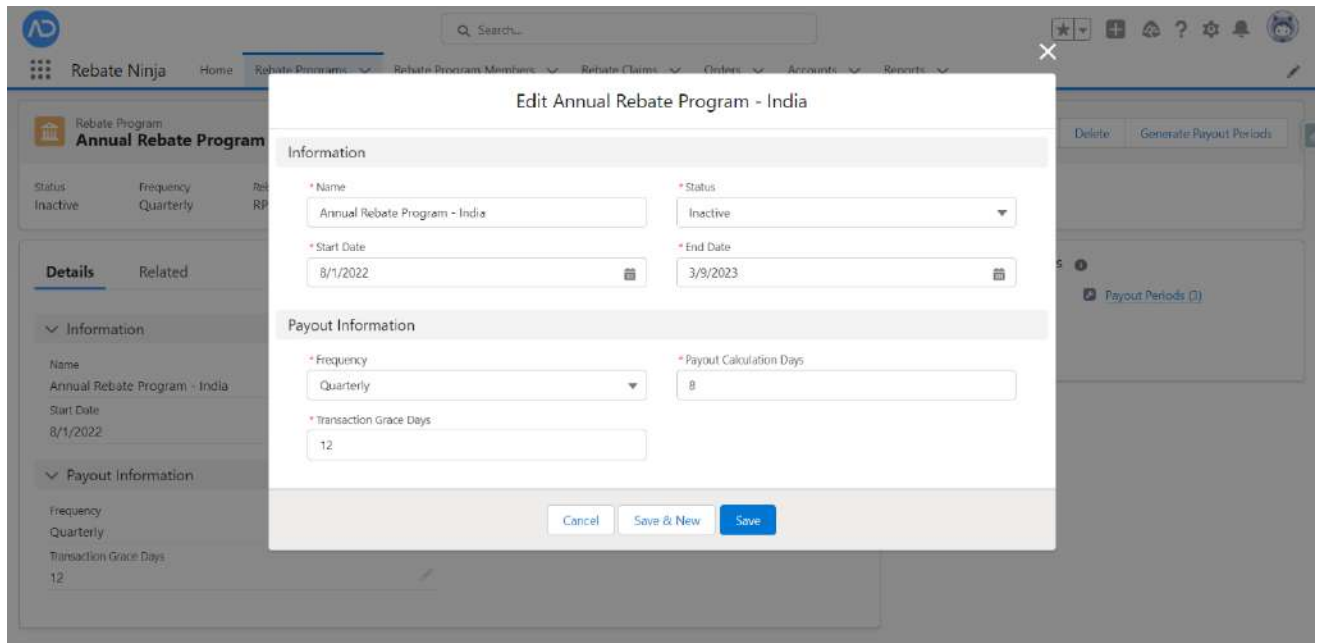
**Related List Quick Links**

- [Rebate Program Members \(9\)](#)
- [Payout Periods \(3\)](#)
- [Rebate Types \(3\)](#)

The Related tab lists all the rebate program members, Payout Periods and Rebate Types. The user can also see it from the related quick links as shown above.

#### 4.2.3 Edit Rebate Program:

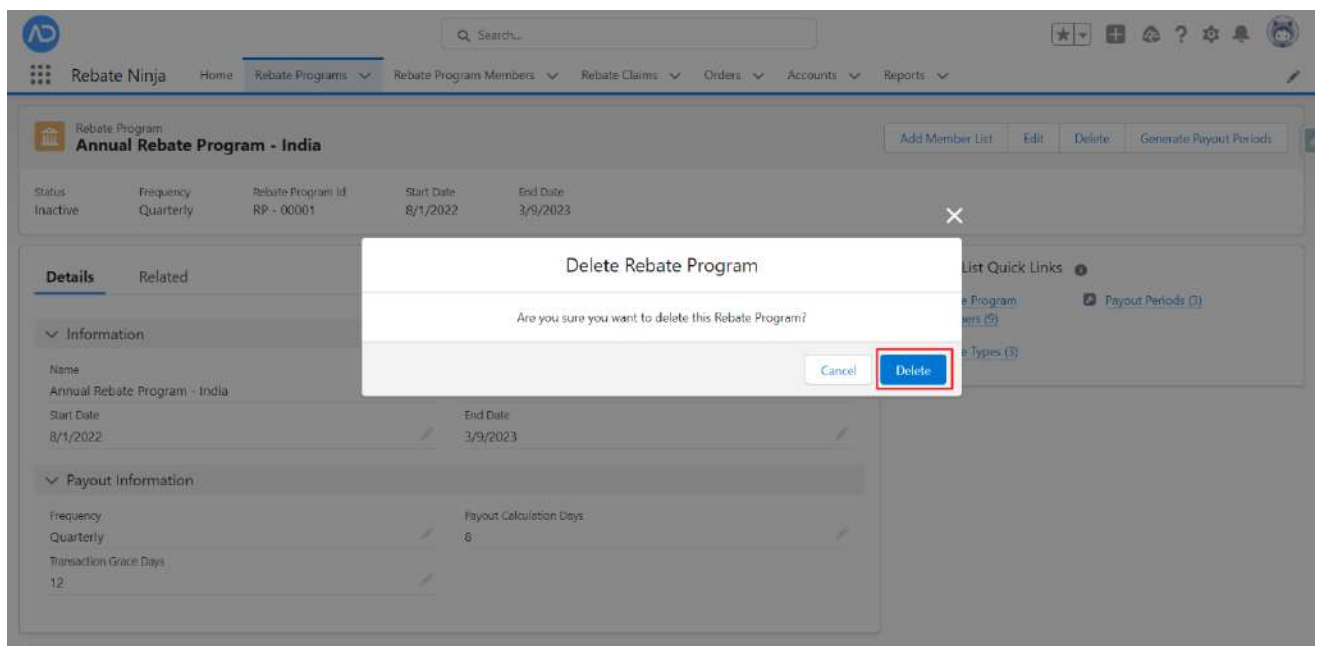
All the information entered while creating a rebate program can be edited using this popup as shown below.



The screenshot shows the 'Edit Annual Rebate Program - India' popup. The background displays the 'Annual Rebate Program' details with fields for Status (Inactive), Frequency (Quarterly), Start Date (8/1/2022), and End Date (3/9/2023). The popup itself has two sections: 'Information' and 'Payout Information'. The 'Information' section contains fields for Name (Annual Rebate Program - India), Status (Inactive), Start Date (8/1/2022), and End Date (3/9/2023). The 'Payout Information' section contains fields for Frequency (Quarterly), Payout Calculation Days (8), and Transaction Grace Days (12). At the bottom of the popup are three buttons: 'Cancel', 'Save & New', and 'Save'.

#### 4.2.4 Delete Rebate Program:

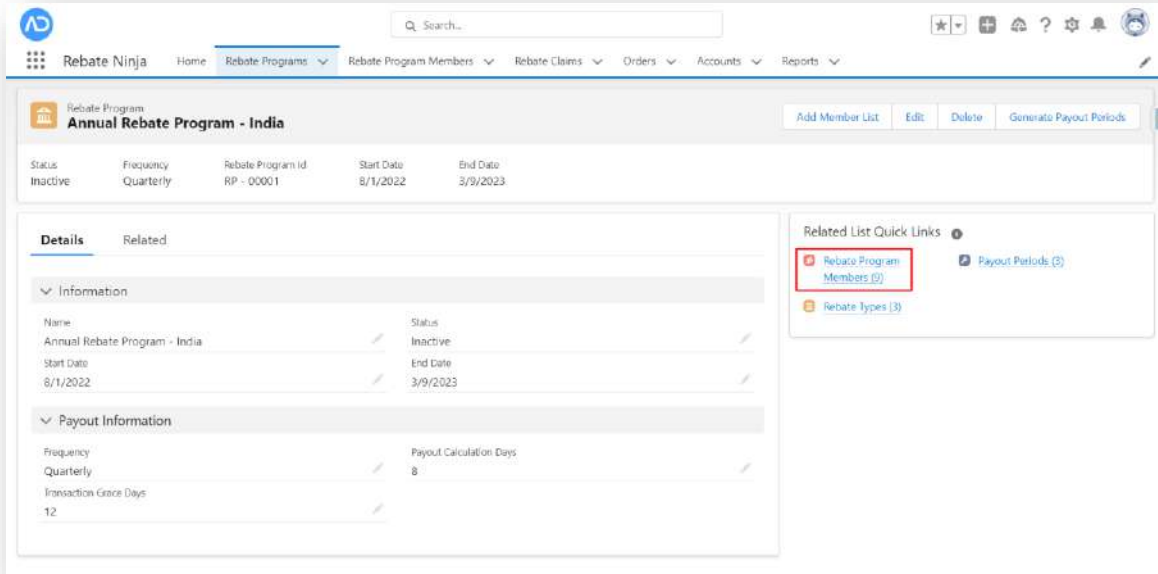
There is an option to “Delete” rebate program. It can be deleted using the top right menu in the rebate program section.



The screenshot shows the 'Delete Rebate Program' popup. The background displays the 'Annual Rebate Program - India' details with fields for Status (Inactive), Frequency (Quarterly), Rebate Program Id (RP - 00001), Start Date (8/1/2022), and End Date (3/9/2023). The popup has a title 'Delete Rebate Program' and a message 'Are you sure you want to delete this Rebate Program?'. At the bottom of the popup are two buttons: 'Cancel' and 'Delete'. The 'Delete' button is highlighted with a red border.

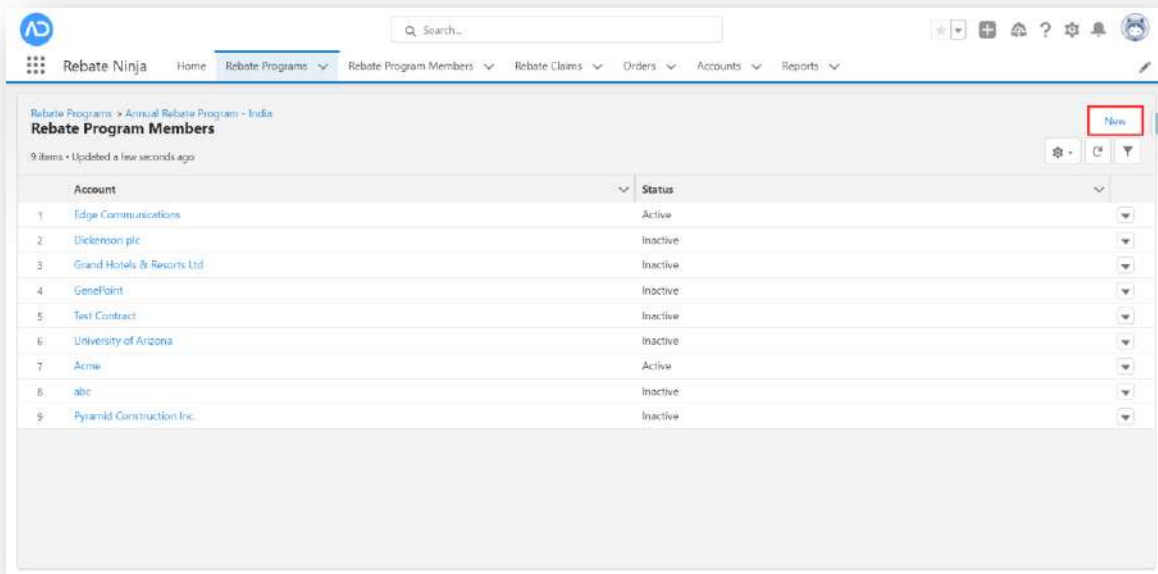
### 4.3 Rebate Program Members:

This will list all the members created for the rebate program.



The screenshot shows the 'Rebate Ninja' dashboard. The 'Rebate Programs' menu is selected, and the 'Annual Rebate Program - India' is displayed. The program status is 'Inactive', frequency is 'Quarterly', and the rebate program ID is 'RP - 00001'. The start date is '8/1/2022' and the end date is '3/9/2023'. The 'Details' tab is active, showing 'Information' and 'Payout Information'. The 'Information' section includes 'Name' (Annual Rebate Program - India), 'Status' (Inactive), 'Start Date' (8/1/2022), and 'End Date' (3/9/2023). The 'Payout Information' section includes 'Frequency' (Quarterly), 'Payout Calculation Days' (8), and 'Transaction Grace Days' (12). The 'Related List Quick Links' section on the right shows a red box around the 'Rebate Program Members (5)' link, with other links like 'Payout Periods (3)' and 'Rebate Types (3)'.

From the related quick links, the user will find the link of Rebate Program Members. Once the user clicks on this link it will display Rebate Program Members Page.

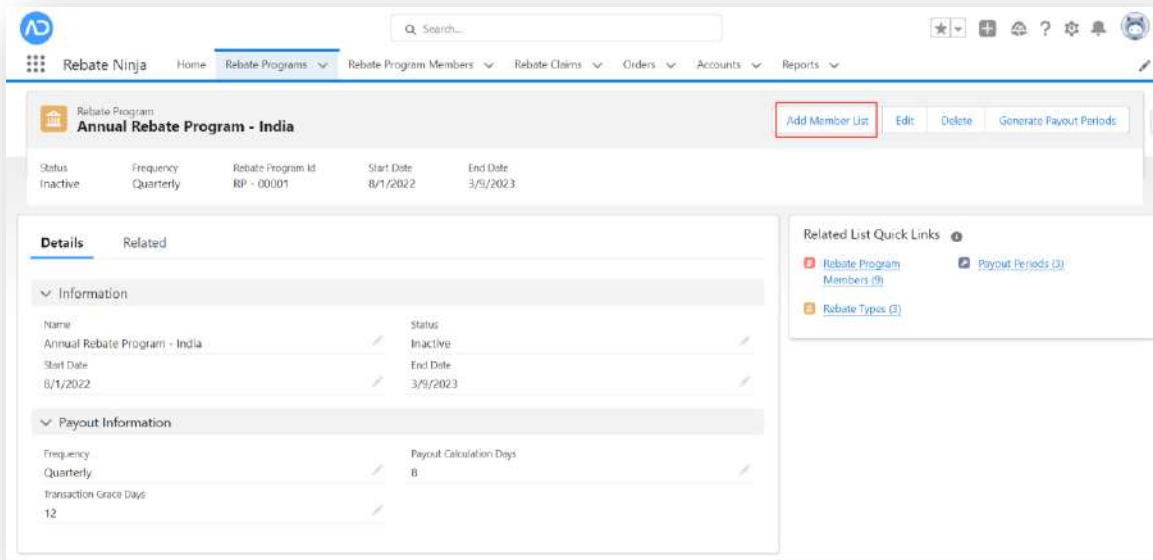


The screenshot shows the 'Rebate Program Members' page. The 'Rebate Programs' menu is selected, and the 'Annual Rebate Program - India' is displayed. The 'Rebate Program Members' link is highlighted in the 'Related List Quick Links' section. The page shows a list of 9 items, updated a few seconds ago. The table has two columns: 'Account' and 'Status'. The 'Account' column lists various companies, and the 'Status' column shows their current status.

| Account                      | Status   |
|------------------------------|----------|
| 1 Edge Communications        | Active   |
| 2 Dickenson plc              | Inactive |
| 3 Grand Hotels & Resorts Ltd | Inactive |
| 4 Genefoint                  | Inactive |
| 5 Text Contract              | Inactive |
| 6 University of Arizona      | Inactive |
| 7 Acme                       | Active   |
| 8 abc                        | Inactive |
| 9 Pyramid Construction Inc.  | Inactive |

This page will display all the Rebate Program Members that are part of this Particular Rebate Program. From the “New” button the user can add members to the Rebate Program one by one.

#### 4.3.1 Add multiple Members from Rebate Program:



The screenshot displays the AIMDek Rebate Ninja interface. The top navigation bar includes a search bar and a menu with options: Home, Rebate Programs, Rebate Program Members, Rebate Claims, Orders, Accounts, and Reports. The main content area is titled "Annual Rebate Program - India" and features a table with the following data:

| Status   | Frequency | Rebate Program Id | Start Date | End Date  |
|----------|-----------|-------------------|------------|-----------|
| Inactive | Quarterly | RP - 00001        | 8/1/2022   | 3/31/2023 |

Below the table, there are two tabs: "Details" and "Related". The "Details" tab is active, showing a form with the following fields:

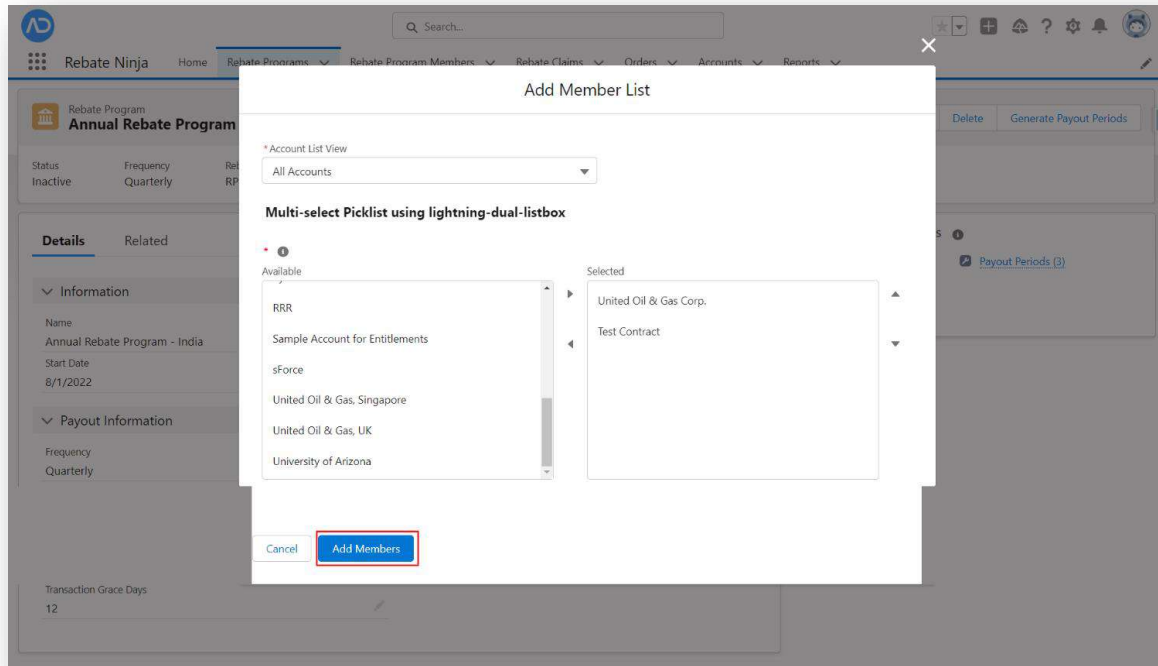
- Information**
  - Name: Annual Rebate Program - India
  - Status: Inactive
  - Start Date: 8/1/2022
  - End Date: 3/31/2023
- Payout Information**
  - Frequency: Quarterly
  - Payout Calculation Days: 8
  - Transaction Grace Days: 12

On the right side of the interface, there is a "Related List Quick Links" section with the following links:

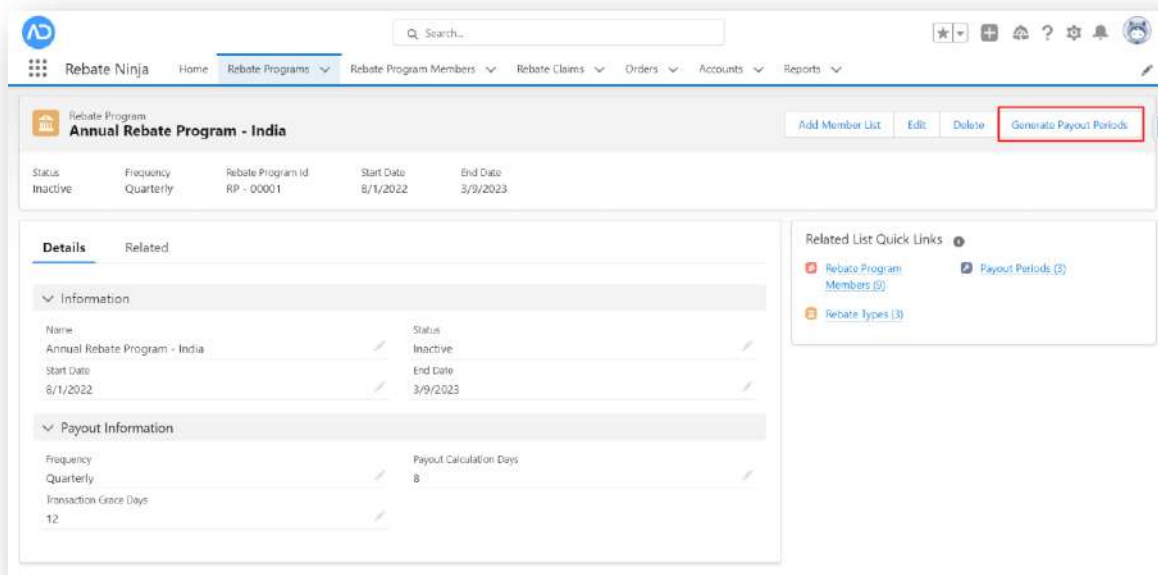
- [Rebate Program Members \(9\)](#)
- [Payout Periods \(3\)](#)
- [Rebate Types \(3\)](#)

The "Add Member List" button is highlighted with a red box in the top right corner of the main content area.

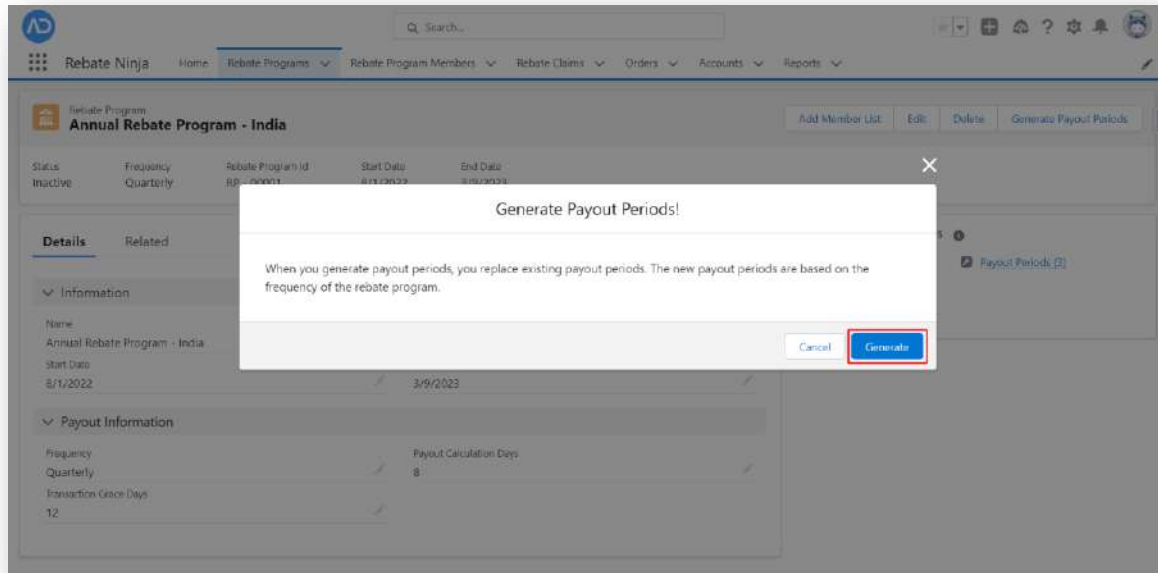
Once the user clicks on “Add Member List” button it will open a popup where the user needs to select the Account List View dropdown and then add multiple members to the Rebate Program.



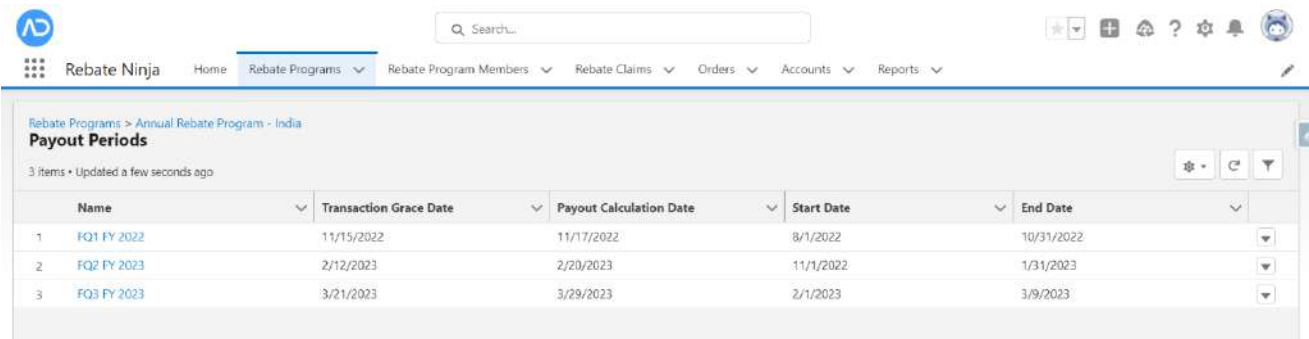
#### 4.4 Generate Payout Periods for the Rebate Program:



When the user clicks on the “Generate Payout Periods” button the following popup will appear.



When the user clicks on the “Generate” button, Payout Periods will be generated for that Rebate Program.



| Name        | Transaction Grace Date | Payout Calculation Date | Start Date | End Date   |
|-------------|------------------------|-------------------------|------------|------------|
| FQ1 FY 2022 | 11/15/2022             | 11/17/2022              | 8/1/2022   | 10/31/2022 |
| FQ2 FY 2023 | 2/12/2023              | 2/20/2023               | 11/1/2022  | 1/31/2023  |
| FQ3 FY 2023 | 3/21/2023              | 3/29/2023               | 2/1/2023   | 3/9/2023   |

This will be used to generate payout periods based on the start date, end date and frequency of the rebate program.

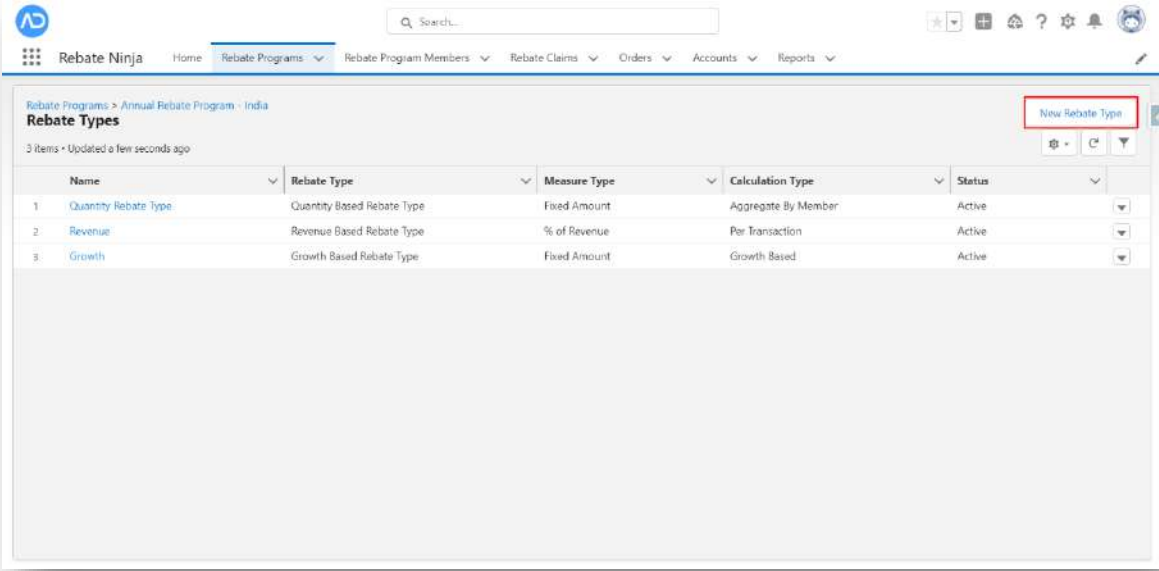
#### 4.5 Rebate Types for the Rebate Program:

There will be three Rebate Types for the Particular Rebate Program:

1. Quantity Based Rebate Type: This will be based on the number of quantities of goods ordered by the program members.
2. Revenue Based Rebate Type: This will be based on the Total Revenue for these program members.

3. Growth Based Rebate Type: This will be based on the Growth of these program members.

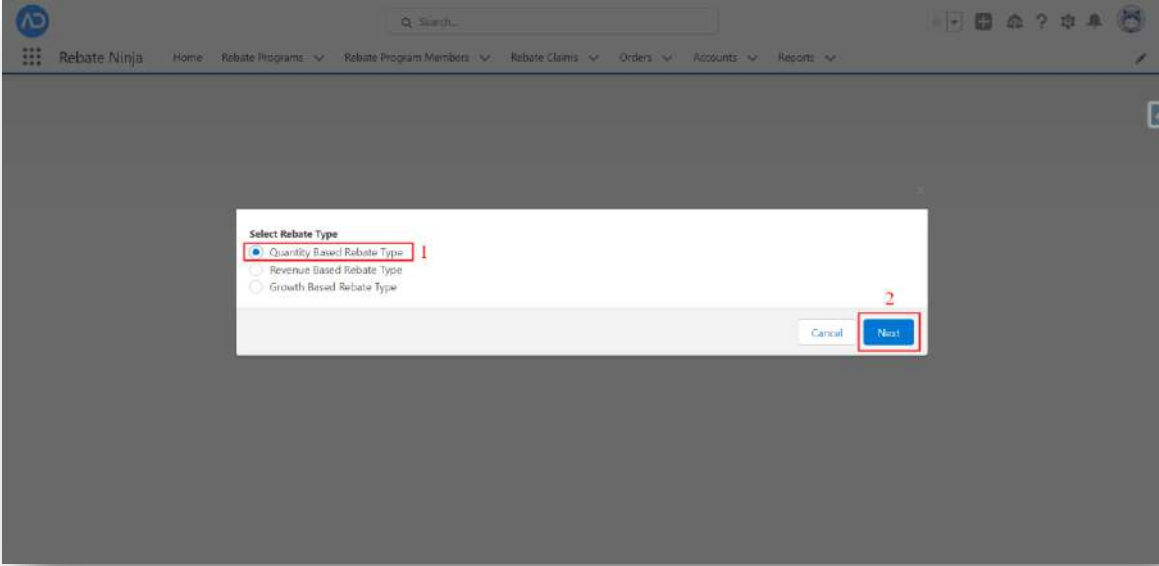
There will be three Rebate Types for a Rebate Program and None will be repeated twice.



The screenshot shows the 'Rebate Ninja' application interface. The top navigation bar includes a search bar and several menu items: Home, Rebate Programs, Rebate Program Members, Rebate Claims, Orders, Accounts, and Reports. The 'Rebate Programs' menu is currently selected. Below the navigation bar, the page title is 'Rebate Programs > Annual Rebate Program - India'. The main content area is titled 'Rebate Types' and shows a table with 3 items. A 'New Rebate Type' button is visible in the top right corner of the table area.

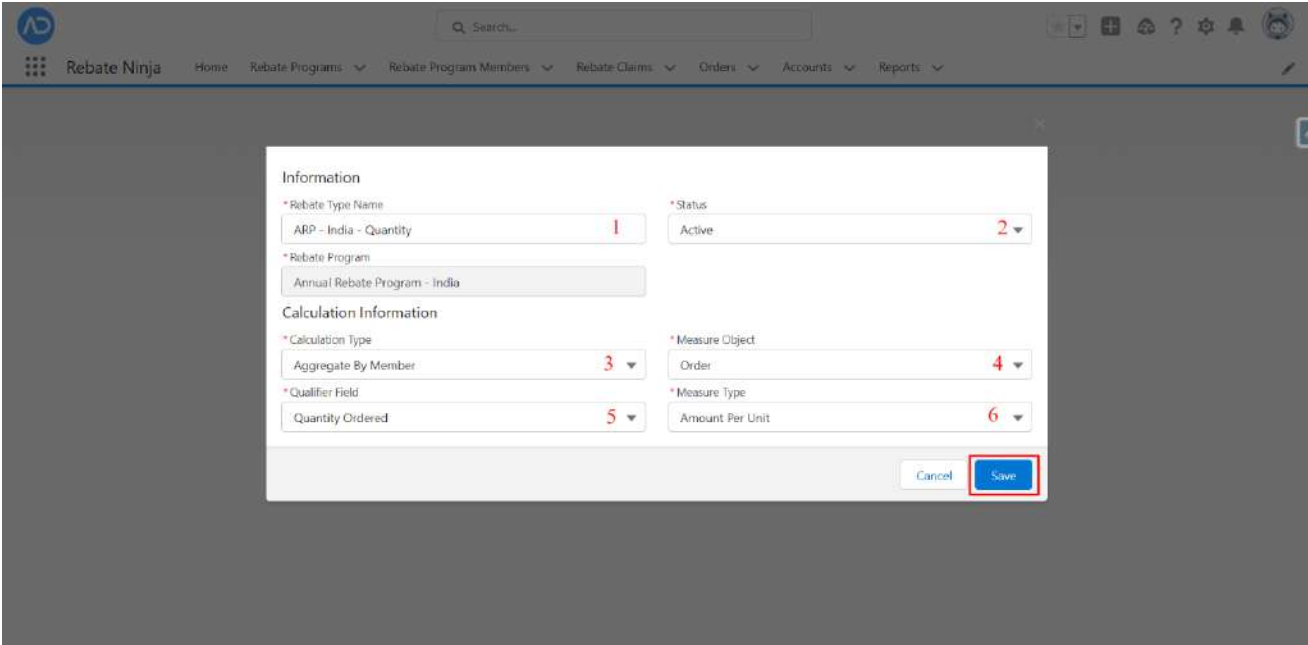
| Name                                    | Rebate Type                | Measure Type | Calculation Type    | Status |
|-----------------------------------------|----------------------------|--------------|---------------------|--------|
| 1. <a href="#">Quantity Rebate Type</a> | Quantity Based Rebate Type | Fixed Amount | Aggregate By Member | Active |
| 2. <a href="#">Revenue</a>              | Revenue Based Rebate Type  | % of Revenue | Per Transaction     | Active |
| 3. <a href="#">Growth</a>               | Growth Based Rebate Type   | Fixed Amount | Growth Based        | Active |

The above shows the list of Rebate Types for the Rebate Program. When the User clicks on the “New Rebate Type” button the following popup appears.



The screenshot shows the 'Select Rebate Type' dialog box. It contains three radio button options: 'Quantity Based Rebate Type' (selected and labeled with a red '1'), 'Revenue Based Rebate Type', and 'Growth Based Rebate Type'. At the bottom right, there are 'Cancel' and 'Next' buttons, with the 'Next' button labeled with a red '2'.

The user needs to select the Rebate Type from the three options and then click on “Next” button.

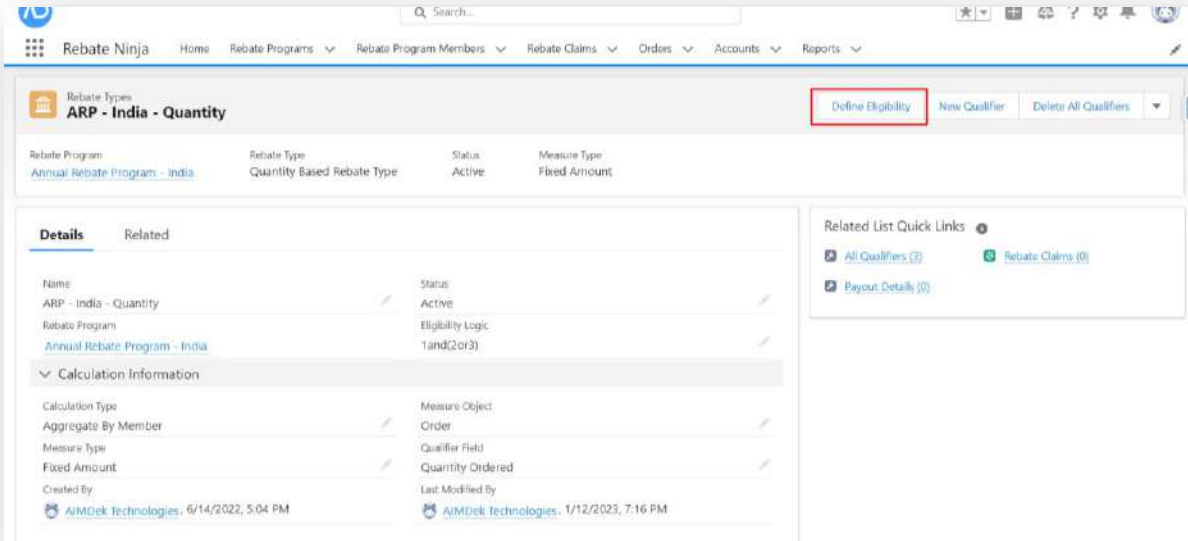


The screenshot shows the 'Information' and 'Calculation Information' form. The 'Information' section includes fields for 'Rebate Type Name' (labeled with a red '1'), 'Status' (labeled with a red '2'), and 'Rebate Program'. The 'Calculation Information' section includes fields for 'Calculation Type' (labeled with a red '3'), 'Measure Object' (labeled with a red '4'), 'Qualifier Field' (labeled with a red '5'), and 'Measure Type' (labeled with a red '6'). At the bottom right, there are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted by a red box.

The user needs to add the details for the Rebate Type that it has selected earlier. And click on the save button.

#### 4.5.1 Rebate Type Details:

Rebate type details includes details and related tabs. In the details tab it shows calculation information and in “Related” tab “All qualifiers”, “Rebate Claims” and “Payout Details”.

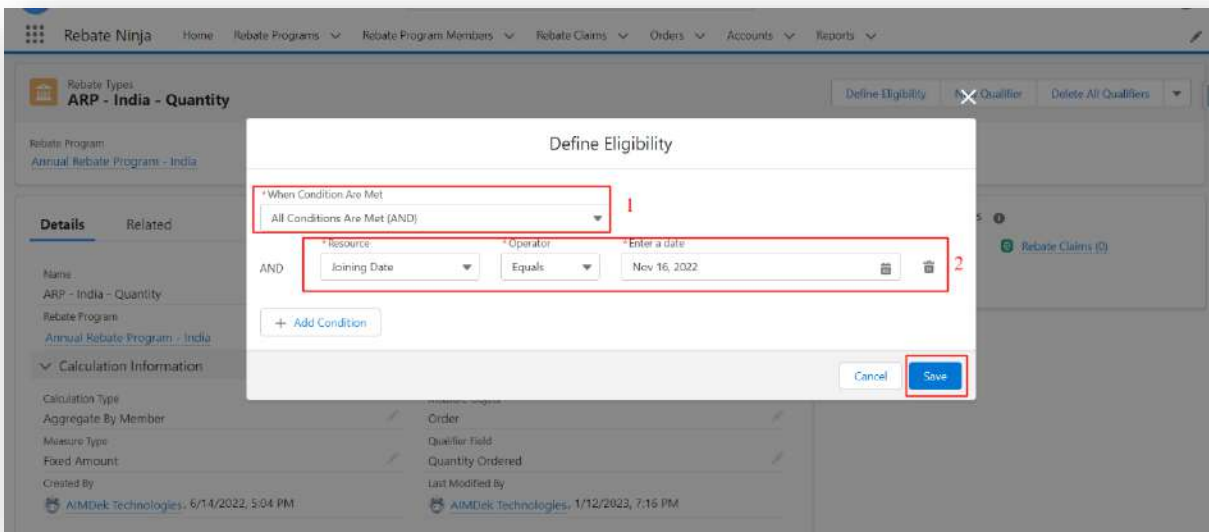


The screenshot shows the 'Rebate Ninja' application interface. The main header includes a search bar and navigation tabs: Home, Rebate Programs, Rebate Program Members, Rebate Claims, Orders, Accounts, and Reports. The current view is for 'Rebate Types' under 'ARP - India - Quantity'. A red box highlights the 'Define Eligibility' button. Below the header, there are tabs for 'Details' and 'Related'. The 'Details' tab is active, showing a table with fields: Name (ARP - India - Quantity), Status (Active), Rebate Program (Annual Rebate Program - India), Eligibility Logic (1and2or3), Calculation Type (Aggregate By Member), Measure Object (Order), Measure Type (Fixed Amount), Qualifier Field (Quantity Ordered), Created By (AIMDek Technologies, 6/14/2022, 5:04 PM), and Last Modified By (AIMDek Technologies, 1/12/2023, 7:16 PM). A 'Related List Quick Links' section on the right shows links for 'All Qualifiers (2)', 'Rebate Claims (0)', and 'Payout Details (0)'.

When the user clicks on the “Define Eligibility” button the following popup appears.

#### 4.5.2 Define Eligibility:

The user needs to add different eligibility conditions so as to make the member eligible if that member has fulfilled the following conditions.

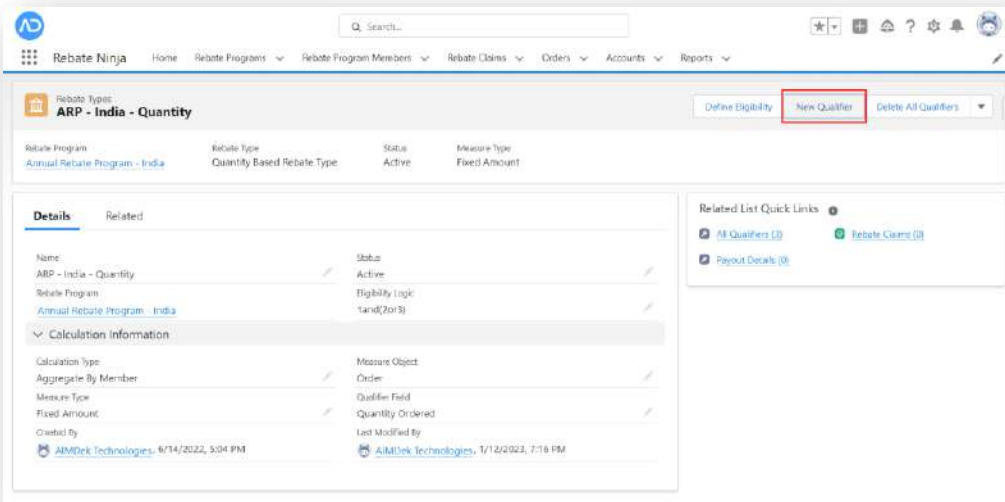


The screenshot shows the 'Define Eligibility' popup window. It has a title bar 'Define Eligibility'. Inside, there is a dropdown menu labeled '\*When Condition Are Met' with the selected option 'All Conditions Are Met (AND)'. Below this, there is a table with columns: Resource, Operator, and Enter a date. The first row shows 'Joining Date' as the Resource, 'Equals' as the Operator, and 'Nov 16, 2022' as the date. A red box highlights the 'Joining Date' and 'Equals' fields, with a red box around the date field. A red box also highlights the 'Save' button at the bottom right. There is an '+ Add Condition' button and a 'Cancel' button.

The user first needs to select “When Conditions are met” dropdown and add the conditions as per the requirement. And then click on the save button.

#### 4.5.3 All Qualifiers for the Rebate Type:

Qualifiers are the criteria for the members products, their revenues and their growth that the user needs to add for the particular Rebate Type. The user needs to add the range of the products and based on that how much benefit it will provide to their users. There will be multiple Qualifiers for the Rebate Type.



The screenshot shows the 'ARP - India - Quantity' rebate program details. The 'New Qualifier' button is highlighted with a red box. The program details include:

- Rebate Program:** ARP - India - Quantity
- Rebate Type:** Quantity Based Rebate Type
- Status:** Active
- Measure Type:** Fixed Amount

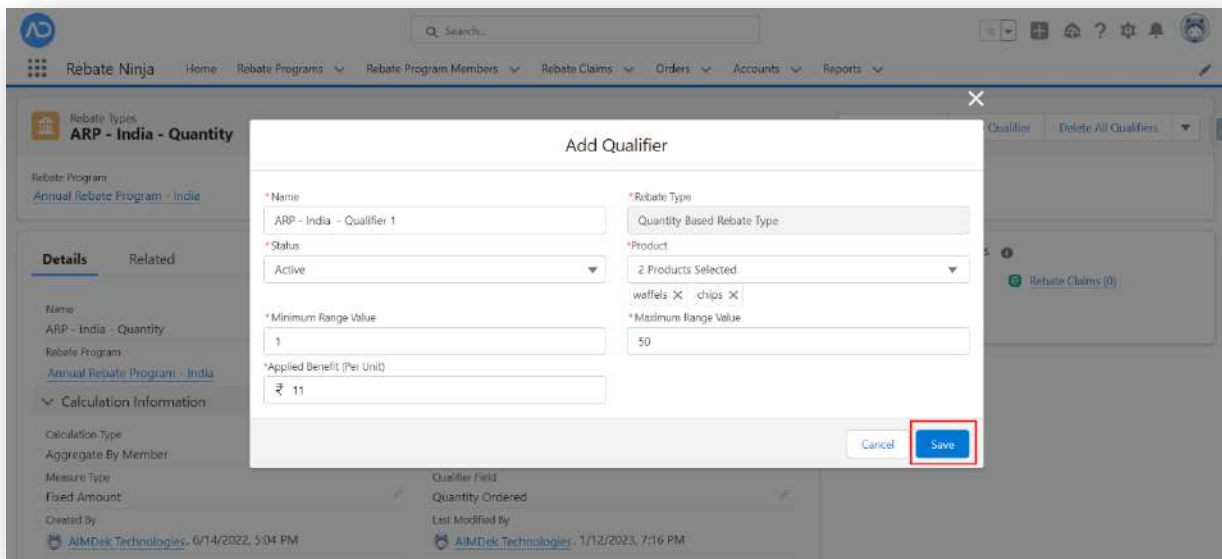
The 'Details' tab shows the following information:

- Name:** ARP - India - Quantity
- Status:** Active
- Rebate Program:** Annual Rebate Program - India
- Eligibility Logic:** And(2or3)
- Calculation Information:**
  - Calculation Type:** Aggregate By Member
  - Measure Object:** Order
  - Aggregate By Member:** Order
  - Qualifier Field:** Quantity Ordered
  - Measure Type:** Fixed Amount
  - Created By:** AIMDek Technologies, 6/14/2022, 3:04 PM
  - Last Modified By:** AIMDek Technologies, 1/12/2023, 7:16 PM

Related List Quick Links:

- [All Qualifiers \(1\)](#)
- [Rebate Claims \(0\)](#)
- [Payout Details \(0\)](#)

When user clicks on the “New Qualifier” button following popup appears.

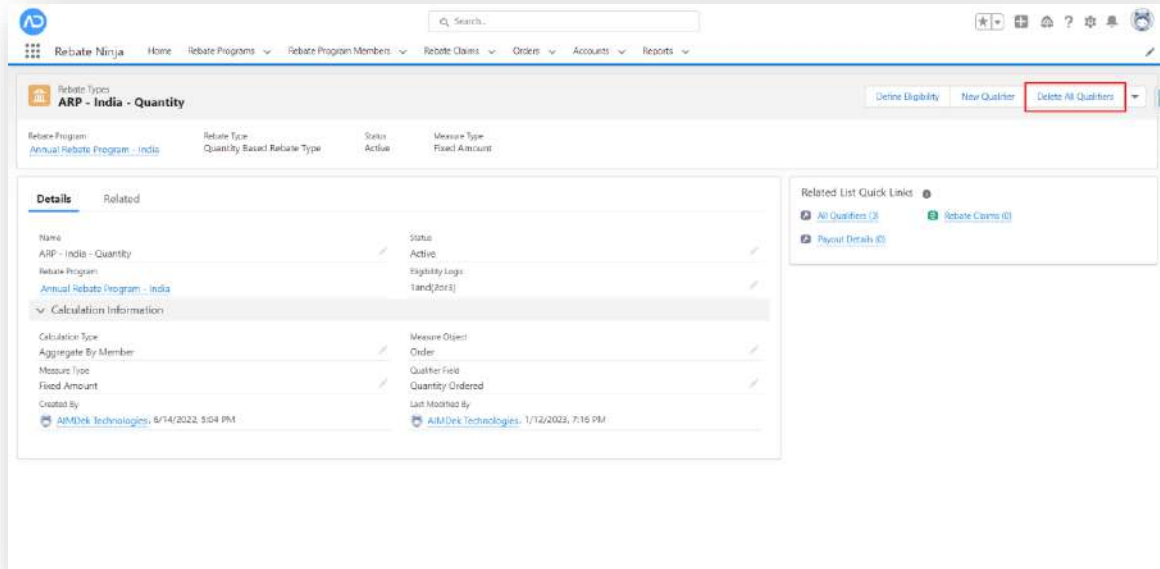


The 'Add Qualifier' popup form contains the following fields:

- Name:** ARP - India - Qualifier 1
- Status:** Active
- Rebate Type:** Quantity Based Rebate Type
- Product:** 2 Products Selected (waffles, chips)
- Minimum Range Value:** 1
- Maximum Range Value:** 50
- Applied Benefit (Per Unit):** ₹ 11

The 'Save' button is highlighted with a red box.

The user needs to add the qualifier details as shown above. It includes Minimum Range Value and Maximum Range Value which means the user will need to add range of Quantity for Quantity Based Rebate Type, Total Revenue for Revenue Based Rebate Type and Growth Percent for Growth Based Rebate Type. Then click on the save button.



The screenshot shows the 'ARP - India - Quantity' rebate program details. The 'Delete All Qualifiers' button is highlighted with a red box. The interface includes a search bar, navigation menu, and a table of details.

| Rebate Program                | Rebate Type                | Status | Measure Type |
|-------------------------------|----------------------------|--------|--------------|
| Annual Rebate Program - India | Quantity Based Rebate Type | Active | Fixed Amount |

**Details**

| Name                          | Status                     |
|-------------------------------|----------------------------|
| ARP - India - Quantity        | Active                     |
| Rebate Program                | Quantity Based Rebate Type |
| Annual Rebate Program - India | Active                     |

**Calculation Information**

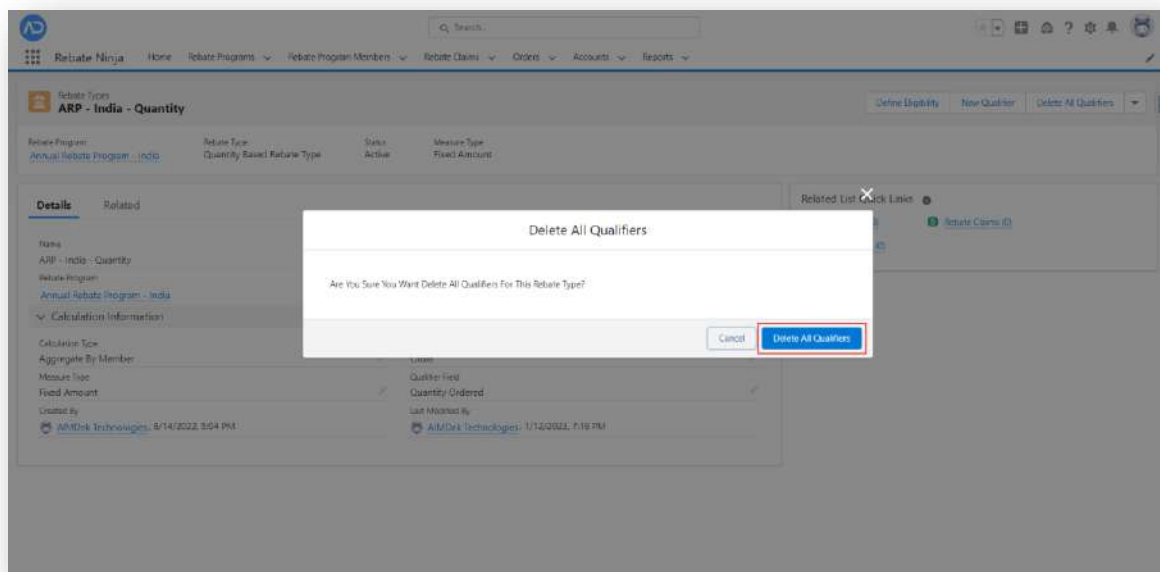
| Calculation Type    | Measure Object   |
|---------------------|------------------|
| Aggregate By Member | Order            |
| Measure Type        | Quantity Ordered |
| Fixed Amount        | Quantity Ordered |

Created By: AIMDek Technologies, 8/14/2022, 5:04 PM  
Last Modified By: AIMDek Technologies, 1/12/2023, 7:15 PM

**Related List Quick Links**

- All Qualifiers (3)
- Rebate Claims (0)
- Payout Details (0)

When the user clicks on the “Delete All Qualifiers” button, It will show the following popup.



The screenshot shows a confirmation popup titled 'Delete All Qualifiers'. The popup asks: 'Are You Sure You Want Delete All Qualifiers For This Rebate Type?'. The 'Delete All Qualifiers' button is highlighted with a red box.

**Delete All Qualifiers**

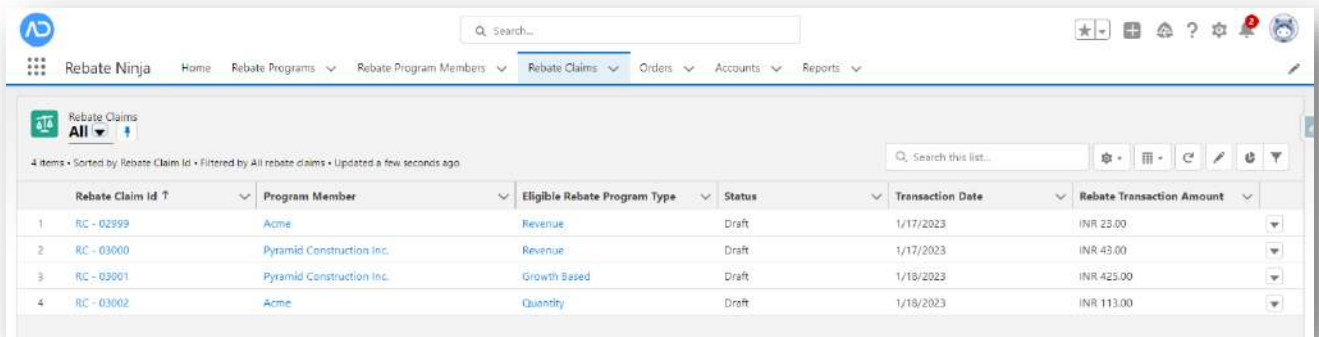
Are You Sure You Want Delete All Qualifiers For This Rebate Type?

Cancel Delete All Qualifiers

When the user clicks on the “Delete All Qualifiers” button from the popup, it will delete all the related Qualifiers of the Rebate Type at once. The user doesn’t need to delete it one by one as there will be multiple Qualifiers.

#### 4.6 Rebate Claims:

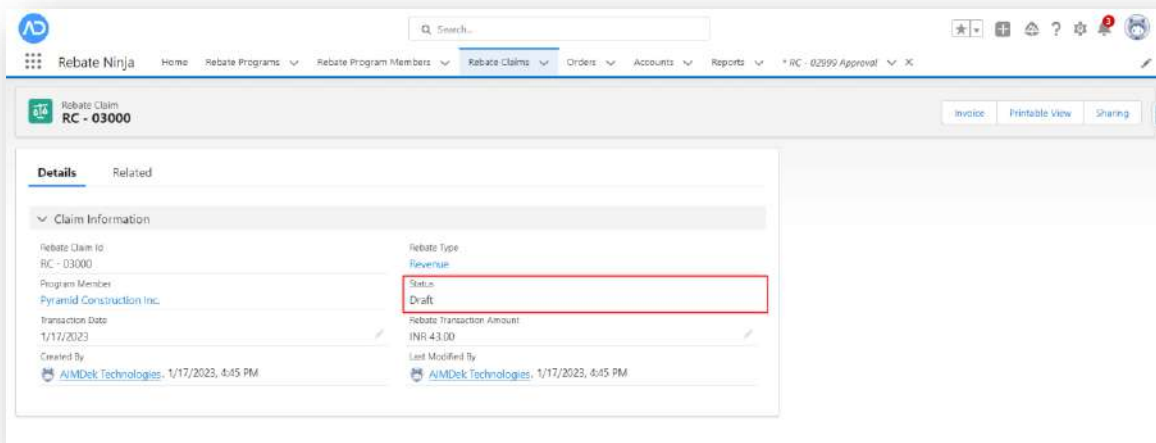
Rebate claims are basically generated for the rebate program members who will be eligible for the Rebate Type wise Rebate Program. It is based on the three different rebate types I.e., Quantity Based, Revenue Based, and Growth Based.



The screenshot shows the 'Rebate Claims' tab in the application. It displays a list of 4 items, sorted by Rebate Claim Id. The table has the following columns: Rebate Claim id, Program Member, Eligible Rebate Program Type, Status, Transaction Date, and Rebate Transaction Amount.

| Rebate Claim id | Program Member            | Eligible Rebate Program Type | Status | Transaction Date | Rebate Transaction Amount |
|-----------------|---------------------------|------------------------------|--------|------------------|---------------------------|
| 1 RC - 02999    | Acme                      | Revenue                      | Draft  | 1/17/2023        | INR 23.00                 |
| 2 RC - 03000    | Pyramid Construction Inc. | Revenue                      | Draft  | 1/17/2023        | INR 43.00                 |
| 3 RC - 03001    | Pyramid Construction Inc. | Growth Based                 | Draft  | 1/18/2023        | INR 425.00                |
| 4 RC - 03002    | Acme                      | Quantity                     | Draft  | 1/18/2023        | INR 113.00                |

Once the user clicks on “Rebate Claims” Tab from the Navigation Tab, it will show a list of all rebate claims for the rebate program members.



The screenshot shows the details of a specific Rebate Claim (RC - 03000). The 'Details' tab is selected, and the 'Claim Information' section is expanded. The following information is displayed:

| Claim Information         |                                         |
|---------------------------|-----------------------------------------|
| Rebate Claim Id           | RC - 03000                              |
| Program Member            | Pyramid Construction Inc.               |
| Transaction Date          | 1/17/2023                               |
| Created By                | AIMDek Technologies, 1/17/2023, 4:45 PM |
| Rebate Type               | Revenue                                 |
| Status                    | Draft                                   |
| Rebate Transaction Amount | INR 43.00                               |
| Last Modified By          | AIMDek Technologies, 1/17/2023, 4:45 PM |



When the Rebate Claim is generated, its status will be set as draft as shown above.

A screenshot of the 'Rebate Ninja' web application. The top navigation bar includes 'Home', 'Rebate Programs', 'Rebate Program Members', 'Rebate Claims' (selected), 'Orders', 'Accounts', and 'Reports'. A search bar is on the right. Below the navigation, the page title is 'Rebate Claim RC - 03000'. To the right of the title are buttons for 'Invoice', 'Printable View', and 'Sharing'. The main content area has two tabs: 'Details' (selected) and 'Related'. Under 'Details', there is a section titled 'Claim Information' with a table of fields:

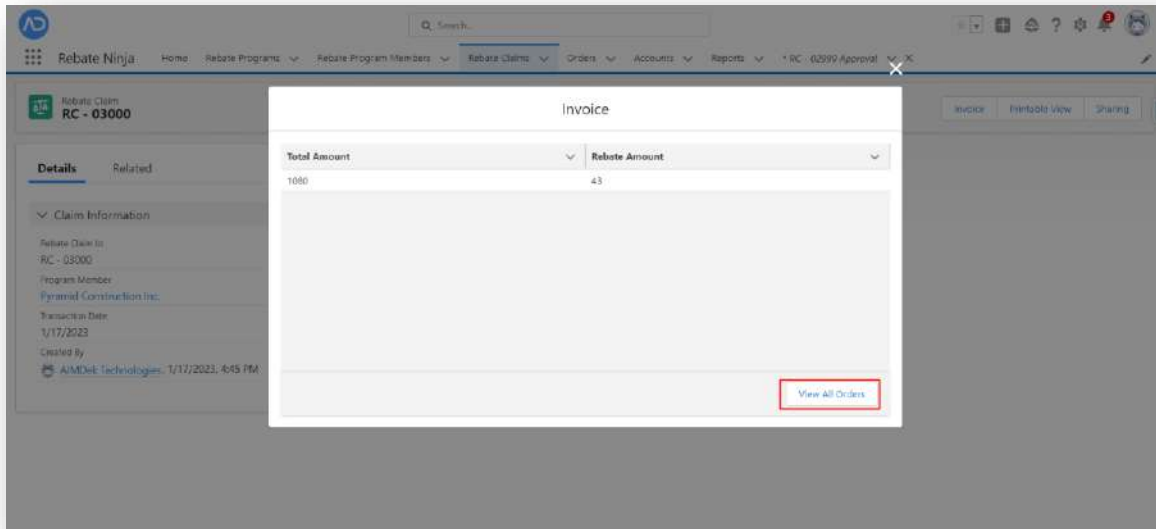
| Claim Information         |                                         |
|---------------------------|-----------------------------------------|
| Rebate Claim ID           | RC - 03000                              |
| Program Member            | Pyramid Construction Inc.               |
| Transaction Date          | 1/17/2023                               |
| Created By                | AIMDek Technologies, 1/17/2023, 4:45 PM |
| Rebate Type               | Revenue                                 |
| Status                    | Draft                                   |
| Rebate Transaction Amount | INR 43.00                               |
| Last Modified By          | AIMDek Technologies, 1/17/2023, 4:45 PM |

The user can check the Invoice of the generated Rebate Claim to check how the claim is generated. When the user clicks on the “Invoice” button the following popup appears.

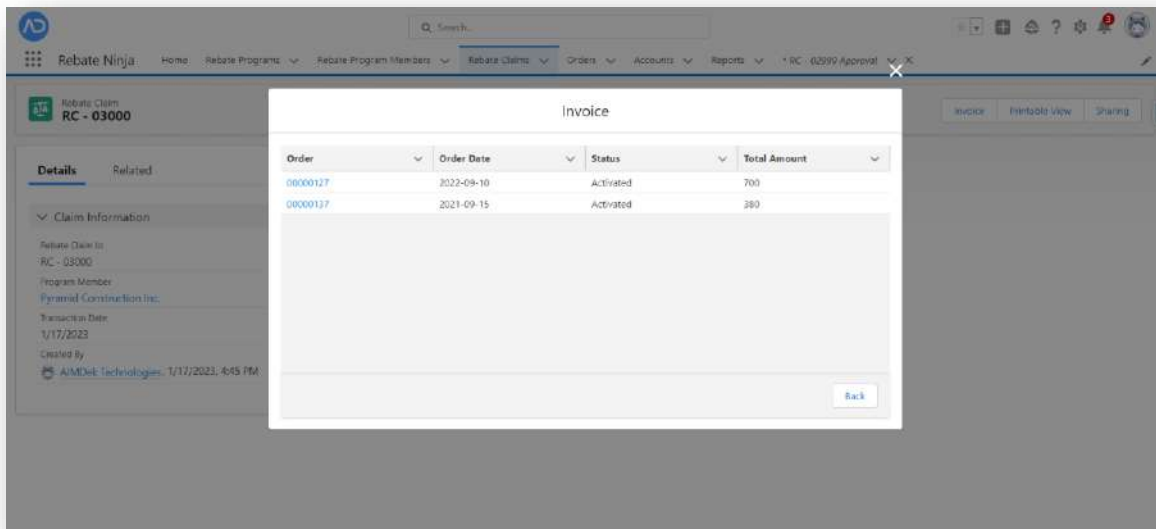
A screenshot of the 'Rebate Ninja' web application with an 'Invoice' popup window open. The popup has a title bar 'Invoice' and a close button. It contains a table with two columns: 'Total Amount' and 'Rebate Amount'. The 'Total Amount' row shows '1080'. The 'Rebate Amount' row shows '43'. At the bottom right of the popup is a button labeled 'View All Orders'.

| Total Amount | Rebate Amount |
|--------------|---------------|
| 1080         | 43            |

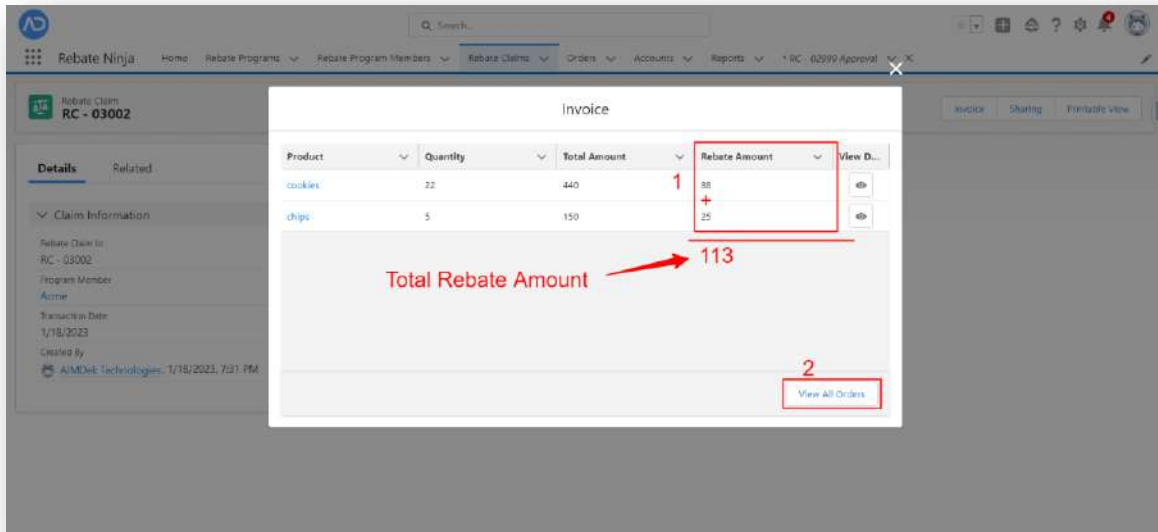
The above figure shows the Rebate Amount of the program member eligible for the Revenue Based Rebate Type.



When the user clicks on the “View All Orders” button it will display the Orders Information as shown in the below figure.



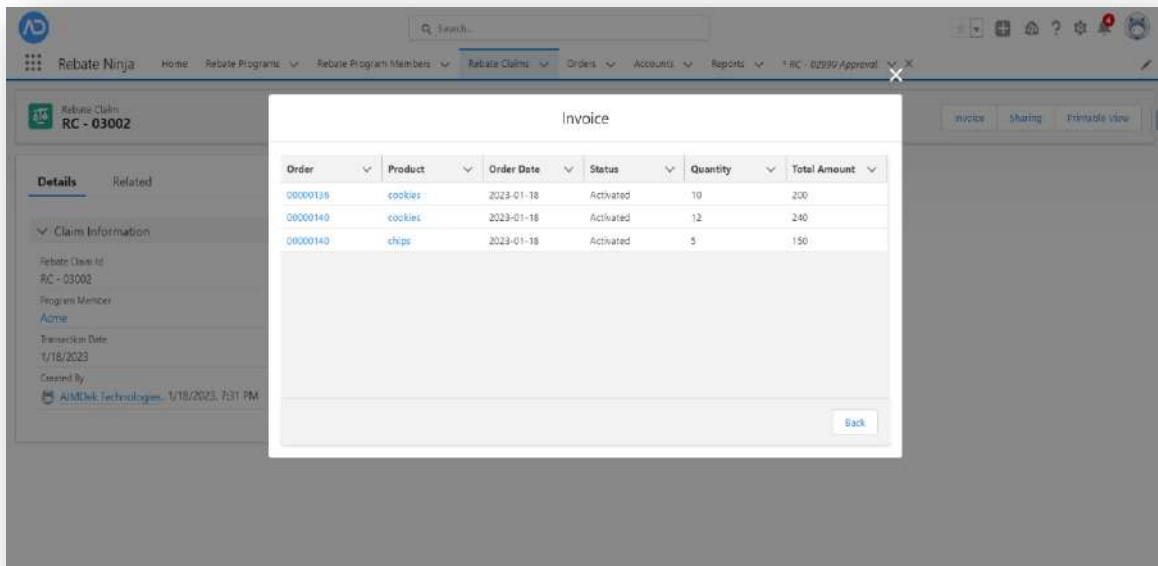
The above figure will show the orders information for the particular member whose claim is generated for the Revenue Based Rebate Type.



| Product                    | Quantity | Total Amount | Rebate Amount |
|----------------------------|----------|--------------|---------------|
| cookies                    | 22       | 440          | 88            |
| chips                      | 5        | 150          | 25            |
| <b>Total Rebate Amount</b> |          |              | <b>113</b>    |

**View All Orders**

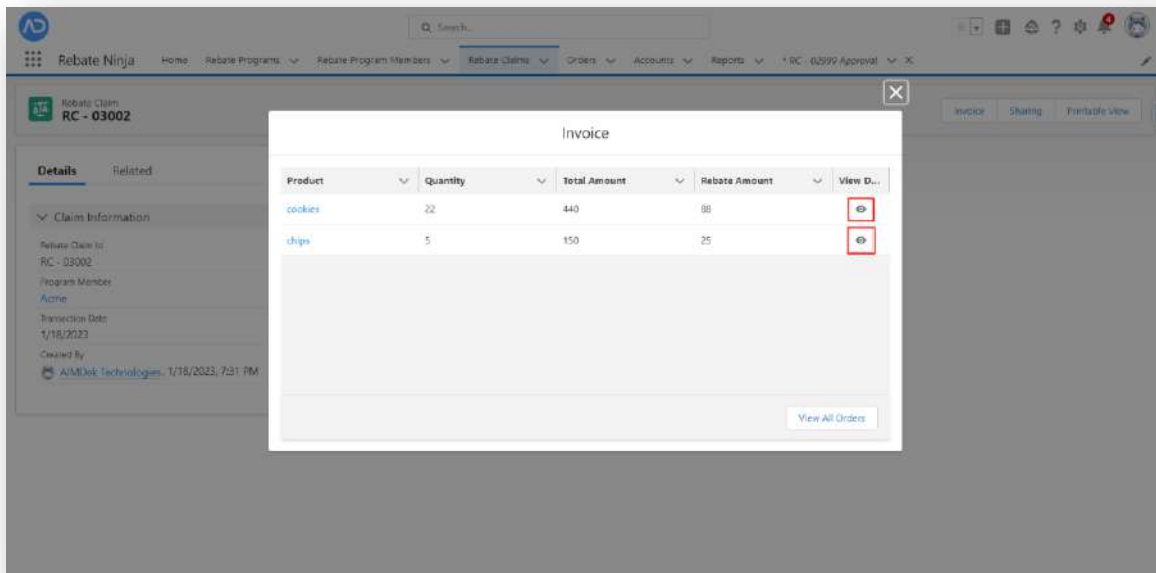
The above figure shows the Rebate Amount of the program member eligible for the Quantity Based Rebate Type. When the user clicks on the “View All Orders” button it will display the Orders Information as shown in the below figure.



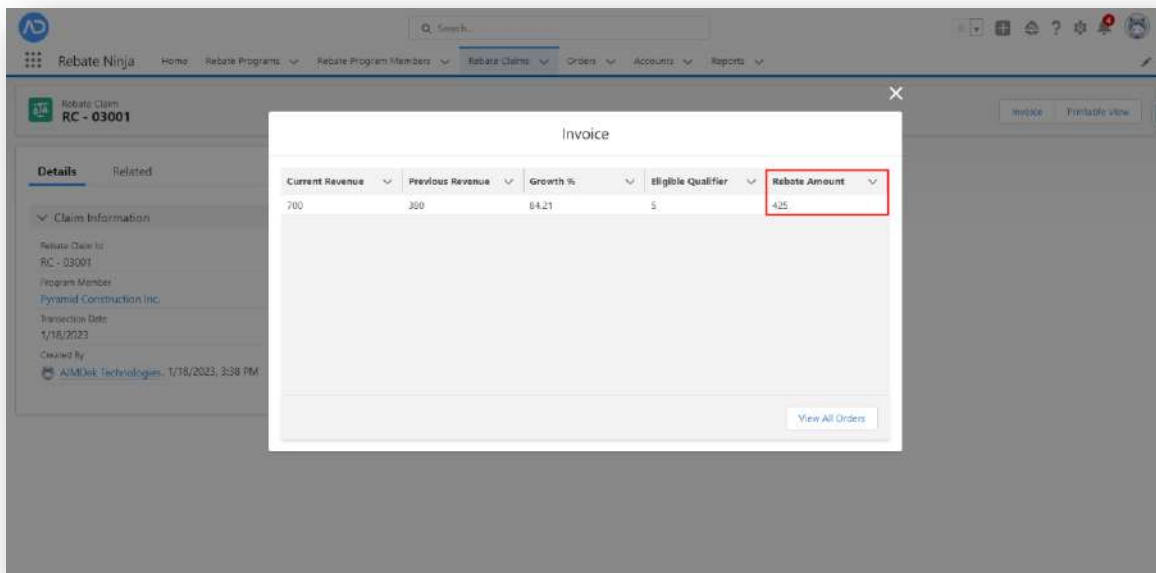
| Order    | Product | Order Date | Status    | Quantity | Total Amount |
|----------|---------|------------|-----------|----------|--------------|
| 00000138 | cookies | 2023-01-18 | Activated | 10       | 200          |
| 00000140 | cookies | 2023-01-18 | Activated | 12       | 240          |
| 00000140 | chips   | 2023-01-18 | Activated | 5        | 150          |

[Back](#)

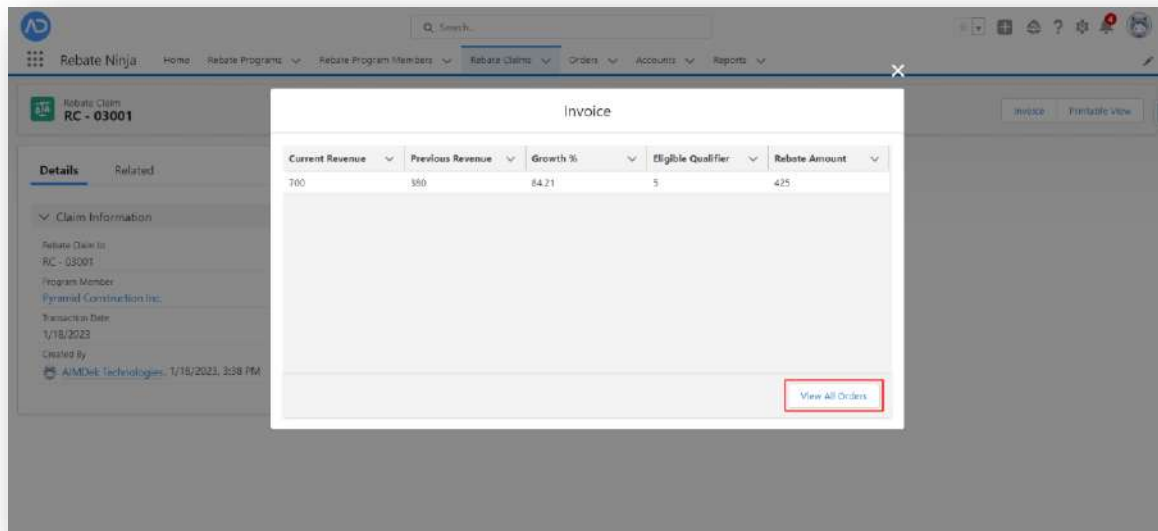
The above figure will show the orders information for the particular member whose claim is generated for the Quantity Based Rebate Type.



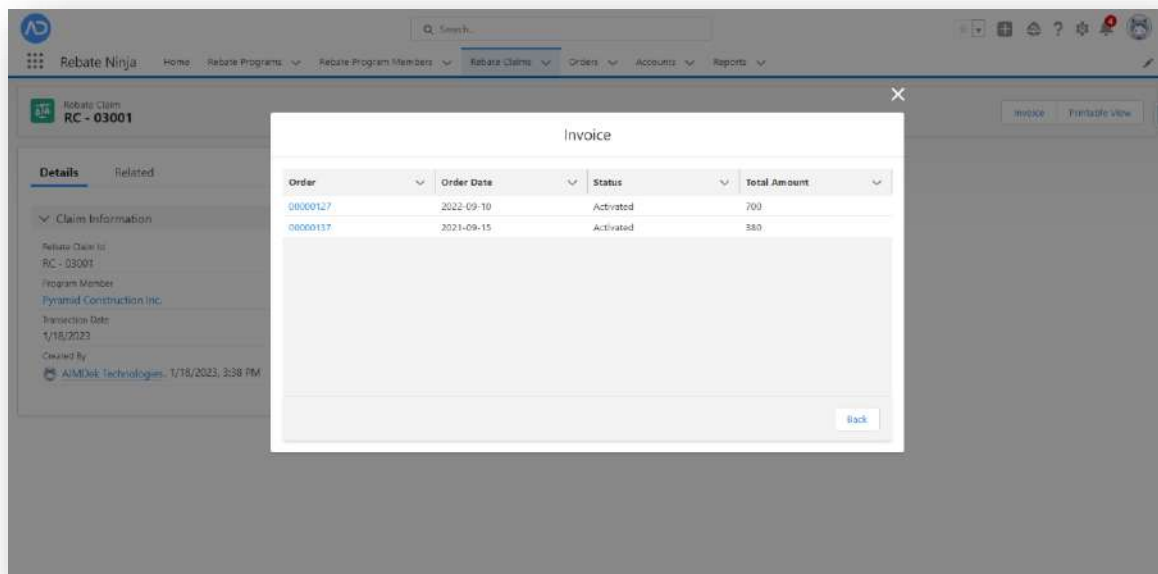
The user can also check the particular product information from the View icon as shown in the above figure.



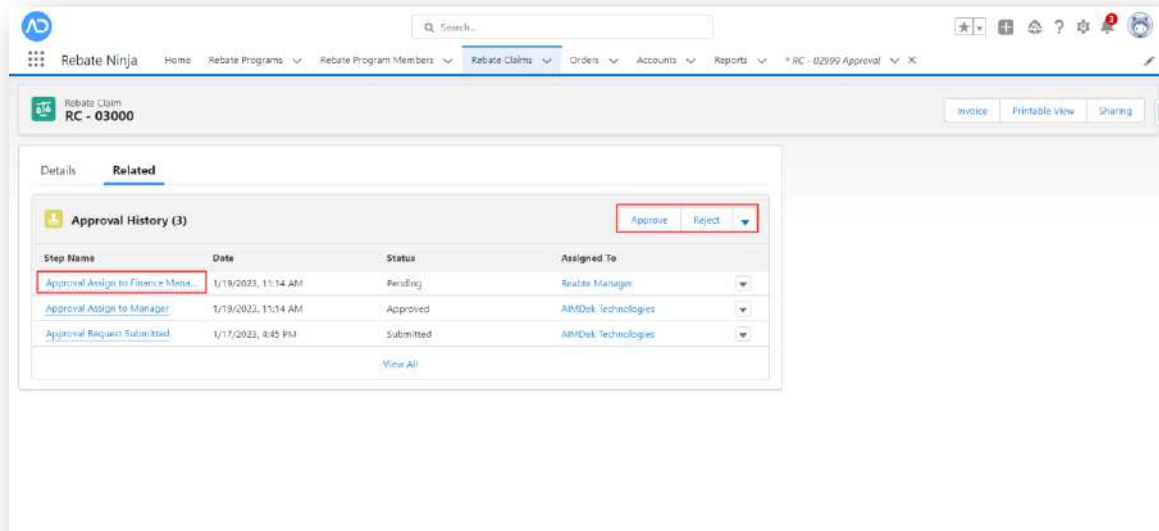
The above figure shows the Rebate Amount of the program member eligible for the Growth Based Rebate Type.



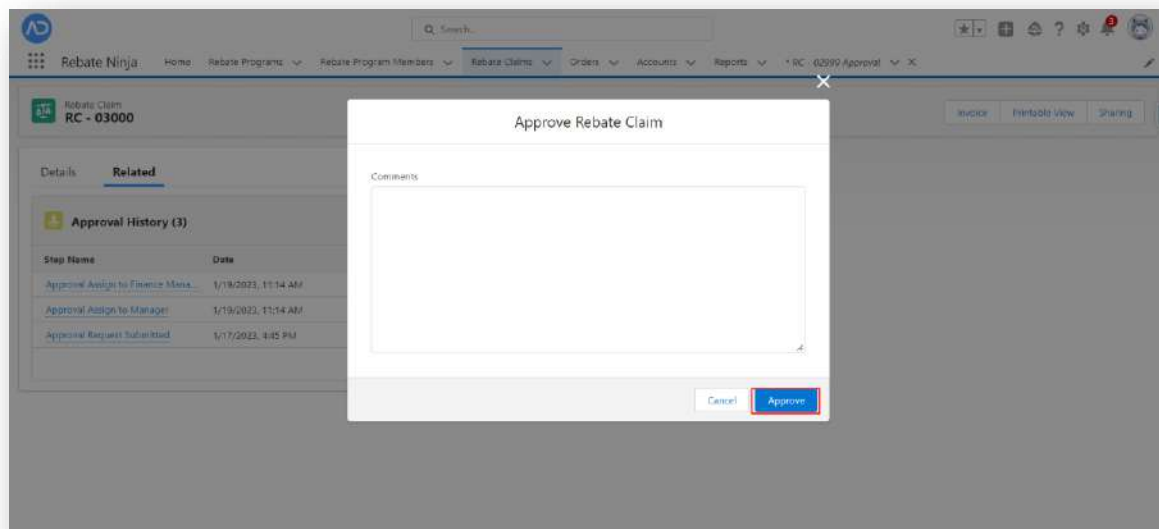
When the user clicks on the “View All Orders” button it will display the Orders Information as shown in the below figure.



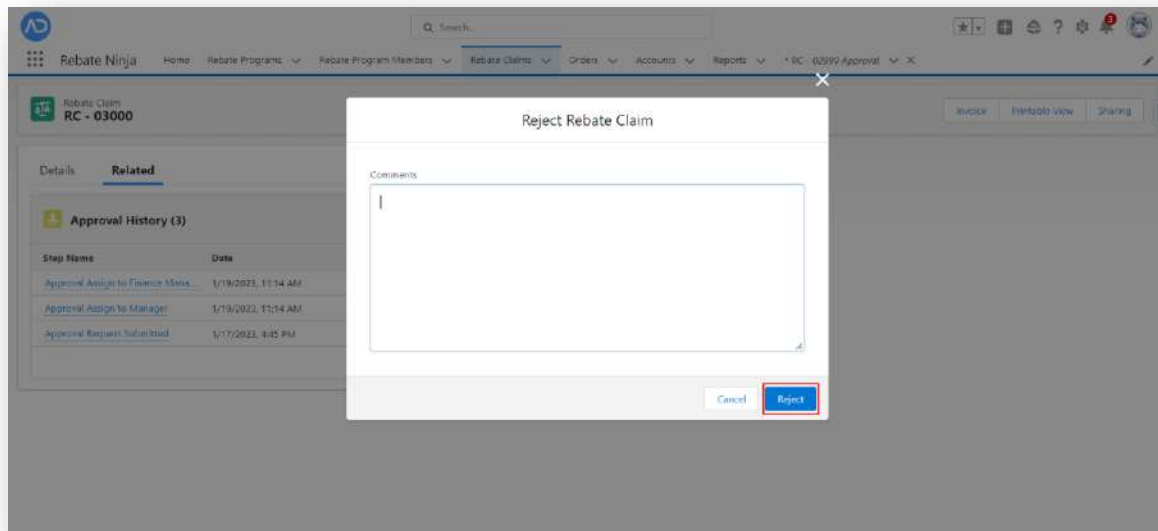
The above figure will show the orders information for the member whose claim is generated for the Growth Based Rebate Type.



When the Rebate Claim is generated, its Approval is assigned to Finance Manager. The Finance Manager will have the right to Approve or Reject the Rebate Claim. Once the Finance Manager approves the Rebate Claim the following popup appears.

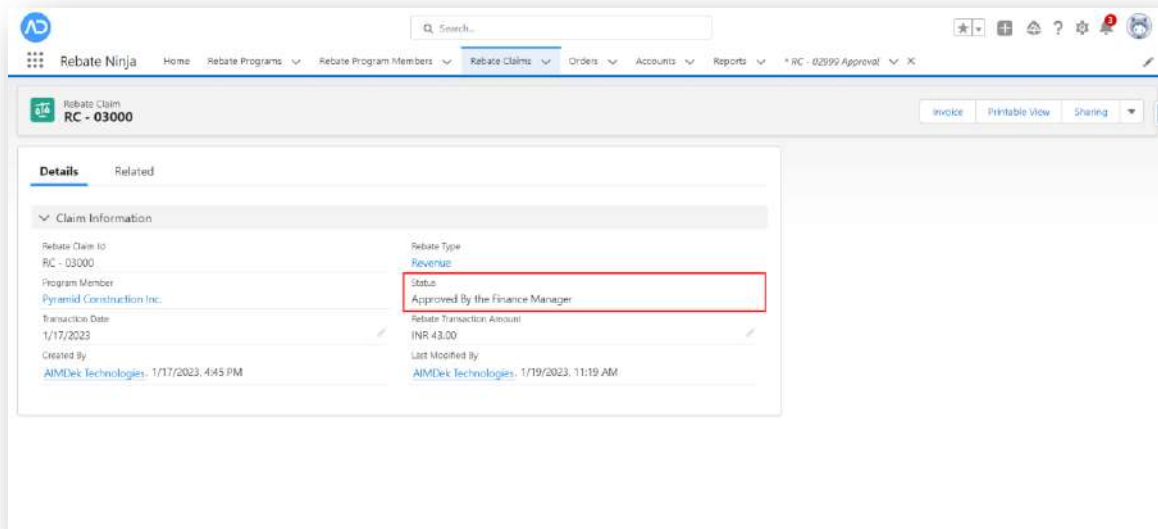


The Finance Manager can add comment for the Approved Rebate Claim and then click on Approve button.



The Finance Manager has the right to Reject the Claim as well. Once he Rejects the Rebate Claim the above popup will appear where the Finance Manager can add comments for the same and then click on Reject button.

Once it is Rejected it will not go the Manager for the approval. The program member will not receive any Rebate Claim.



Once the Claim is approved by Finance Manager, the status of the Rebate Claim will be set to "Approved by Finance Manager". Then it will go to the Manager for its Approval. The Manager has



also the right to approve or reject the Claim. Once the Manager approves the Claim its Status will be changed to “Approve by Manager”.

The screenshot shows the 'Rebate Claim' details for RC - 03000. The status is 'Approved By Manager', which is highlighted with a red box. The claim information includes:

- Rebate Claim ID: RC - 03000
- Program Member: Pyramid Construction Inc.
- Transaction Date: 1/17/2023
- Created By: AIMDek Technologies, 1/17/2023, 4:45 PM
- Rebate Type: Revenue
- Status: Approved By Manager
- Rebate Transaction Amount: INR 43.00
- Last Modified By: AIMDek Technologies, 1/19/2023, 11:14 AM

Once the Claim is Approved by the Manager, its details will be stored in Payout Details as shown below.

The screenshot shows the 'Payout Details' for a Rebate Type of Quantity. The table lists two items:

| Payout Id  | Member Name | Product | Date      | Status | Total Quantity | Total Amount | Rebate Amount |
|------------|-------------|---------|-----------|--------|----------------|--------------|---------------|
| 1 OR-00170 | Acme        | cookies | 1/19/2023 | Unpaid | 22             | 440          | 86            |
| 2 OR-00171 | Acme        | chips   | 1/19/2023 | Unpaid | 5              | 150          | 25            |



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